



Creative Industries Sector Vision:

A joint plan to drive growth, build talent and develop skills





Creative Industries Sector Vision: A joint plan to drive growth, build talent and develop skills

Presented to Parliament by the Secretary of State for Culture,
Media and Sport by Command of His Majesty

June 2023

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Cover photo: Wet Leg at the Brit Awards 2023.



Fashion photography at Kingston School of Art.

PRIME MINISTER'S FOREWORD

Culture is something we all share. All of us have favourite songs that soundtrack the most meaningful moments in our lives



The Rt Hon Rishi Sunak MP
Prime Minister

Culture is something we all share. All of us have favourite songs that soundtrack the most meaningful moments in our lives. All of us remember childhood stories we want to read to our own children. All of us have a TV show we're binge watching and turn to films, games, or the theatre to transport us to a different world.

Many of our favourite things are made here, in the UK. And that's true for people the world over. The creative industries are a true British success story, from global music stars like Adele and Ed Sheeran to world-class cultural institutions like the National Theatre. These industries have a special place in our national life and make a unique contribution to how we feel about ourselves as a country. You can see it in events like Eurovision, shows like Life of Pi, or games like Football Manager: so often the creative industries help to strengthen the bonds between communities.

As well as projecting our values on the world stage, the creative industries drive our economy at home. The contribution they make has often been underappreciated. These industries generate £108 billion a year. Employ over 2.3 million people in every corner of the country. And there is a real sense of energy in the sector, which has grown at more than 1.5 times the rate of the wider economy over the past decade.

I'm personally committed to the success of the creative industries – and so is the government I lead. That's why, at the height of the pandemic, when the very survival of our cultural industries was on the line, I was proud to introduce the £1.57bn Culture Recovery Fund. And it worked. A recent research report showed it protected over 5,000 organisations and supporting 220,000 jobs.

Now, we're determined to go further. Growing our economy is one of my priorities. And growing the economy means growing the creative industries. So today we're setting out this new vision to realise the enormous potential of our creative entrepreneurs and businesses.

Our ambition is nothing less than to grow the creative industries by an extra £50 billion while creating one million extra jobs by 2030.

To do that, we need to play to our unique strengths. As technology increasingly infuses the creative industries, our competitive advantage in both sectors means this country has an unparalleled opportunity in the decades ahead.

We need to level up. Projects like the British Library's landmark new centre in Leeds show us the way – a brilliant way to mark their 50th anniversary. But to go even further, we're expanding the numbers of creative clusters across the country. Creating new centres of excellence in areas like film and TV, design and video games. And building a pipeline of talent and opportunity for our young people.

And we need to do more to equip our young people with the skills to thrive and succeed in a world where technology is changing the industry. That includes extending maths teaching in some form to 18; because we know that from games design to set design, quantitative skills are ever more important.

These are ambitious and stretching goals. So we're beginning our work in earnest with over £75 million of new investment into the sector, building on over £230 million of support since 2021. This funding will allow our young people to release their inner creativity, help

our start-ups become scale-ups, and turn local businesses into international exporters.

The UK has a centuries-long heritage of extraordinarily creative and vibrant arts and culture. Now, we have an opportunity to secure those enduring strengths and lead the world, long into the future. And with this new Vision, that's exactly what we'll do.

DCMS AND INDUSTRY FOREWORD

Our creative industries are world-leading, an engine of our economic growth and at the heart of our increasingly digital world



The Rt Hon Lucy Frazer KC MP
Secretary of State
for Culture, Media and Sport

Our creative industries are world-leading, an engine of our economic growth and at the heart of our increasingly digital world. From 2010 to 2019 they grew more than one and a half times faster than the wider economy and in 2021 they generated £108 billion in economic value. In 2021, they employed 2.3 million people, a 49% increase since



Sir Peter Bazalgette
Industry Co-Chair of the
Creative Industries Council

2011. Their impact reaches beyond their borders to other sectors, with advertising, marketing and creative digital innovation supporting sectors across our economy. This is why the government has identified the creative industries as one of five priority sectors in the 2023 Spring Budget to deliver future growth.

The importance of the creative industries also goes well beyond the economy. They provide the news that informs our democracy, the designs that shape our cities and the content and performances that enrich our lives and strengthen our global image. The sector has proved that it is an essential positive force for society, bringing joy, inspiration and opportunity to our lives. The creative industries form the national conversation through which we define our shared values.

Our creative industries rival any country in the world. The imagination of our designers, writers, artists and creators are driving innovation and growth across the economy. This is, in part, due to how the government and the sector have worked together to make the UK one of the most opportune places in the world to create. But we cannot rely on past success. We can do more to unlock the growth potential of the sector and create opportunities across the UK, such as for young people and the next generation of creative talent, wherever it is.

This Sector Vision, developed across the UK government and in partnership with the Creative Industries Council (CIC), is central to achieving our ambitions for growth. By 2030 we want to:

- grow our creative industries in creative clusters by an extra £50 billion.
- deliver a creative careers promise that builds a pipeline of talent into the sector and supports a million extra jobs.
- intensify the creative industries' ability to enrich our lives and create pride in place.

To do this, this Sector Vision sets out actions that the UK Government and industry have committed to delivering now. This includes

£310 million in government spending, with approximately £233 million of existing public funding since the 2021 Spending Review and £77 million in new government spending announced at the 2023 Creative Industries Growth Moment. This new spending is focused on boosting creative clusters and supporting businesses to grow and export, underpinned by a new commitment to deliver a pipeline of skills and talent. It is accompanied by a plethora of undertakings from creative industries sub-sectors.

The Sector Vision also sets out the spirit in which we will adapt to a world that is constantly being re-invented. It is a living policy framework establishing clear, shared goals as the foundation for how we will work in partnership, led by a refreshed CIC.

We are a creative, innovative country which has a long history of creating opportunities for all. The Sector Vision is a plan to build on this, breaking down barriers, capitalising on the tech opportunities of the Fourth Industrial Revolution and keeping our world-class creative industries ahead of the growing international competition. We want to ensure that the sector can attract and develop the very best creative talent and skills from all backgrounds and parts of the country, from video game businesses in Nottingham to book publishers in Newcastle and theatres in Norwich.

Now is the time to address challenges and to come up with new, creative ideas to meet them. Now is the time to be ambitious to realise the creative industries' potential for growth and to create opportunities for people across the UK, fuelling our economy, culture and society.

EXECUTIVE SUMMARY: OUR 2030 VISION

With limitless creativity, imagination and entrepreneurial spirit, our creative industries are fundamental to the UK's future economic growth

Over the last decade, the sector's output has grown at over one and a half times faster than the rest of the economy and its workforce has grown at almost five times the UK rate.^{1,2} With the right support, we want to realise the growth potential in creative clusters, create opportunities for young people and others, and enrich lives and strengthen pride in place across the UK.

The government's support for the creative sector is longstanding. Since the CIC was established in 2011, the government has:

- reformed and expanded the highly impactful creative industries tax reliefs, including through the introduction of the high-end TV and animation reliefs in 2013, the video games and theatre tax reliefs in 2014, the children's television tax relief in 2015, the orchestra tax relief in 2016, and the museums and galleries tax relief in 2017. The Spring Budget 2023 announced extensions to tax reliefs for orchestras, museums and galleries, and reforms to audiovisual tax reliefs that will provide a greater benefit to recipients
- worked with the CIC to deliver the [Creative Industries Sector Deal](#) in 2018 which set out almost £150 million of

public investment, matched by more than £200 million from industry. This included support for creative clusters in the form of the £56 million Creative Industries Clusters Programmes which drove Research and Development (R&D) across the UK.

More recently, the industry's ingenuity and the government's staunch support, including the Department of Culture, Media and Sport's (DCMS) £500 million [Film and TV Restart Scheme](#) and the unprecedented £1.57 billion [Culture Recovery Fund](#), have helped ensure that activity in nearly all the creative sub-sectors has recovered to pre-pandemic levels.³ In the [2023 Spring Budget](#), the government also set out steps aimed at giving businesses the stability and confidence they need to invest and grow during the challenges with cost of living.

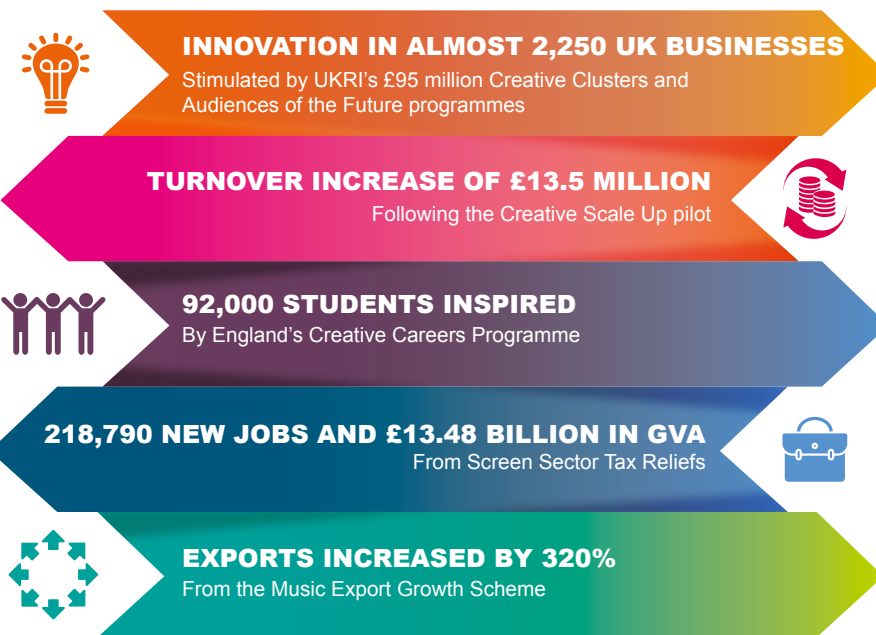
Looking forward, we can expect another surge of growth and employment.⁴ The pandemic's impact was not just short-term, it accelerated changing consumer habits with more people accessing creative works online, using platforms such as Netflix, Amazon, Audible and Etsy.⁵ In tandem, creative businesses embraced new technologies, from live streaming to augmented reality.⁶ New technologies, and the R&D behind them, will

“
It may well be that creativity is the last unfair advantage we're legally allowed to take over our competitors.

Bill Bernbach, advertiser

”

Creative industries Sector Deal successes



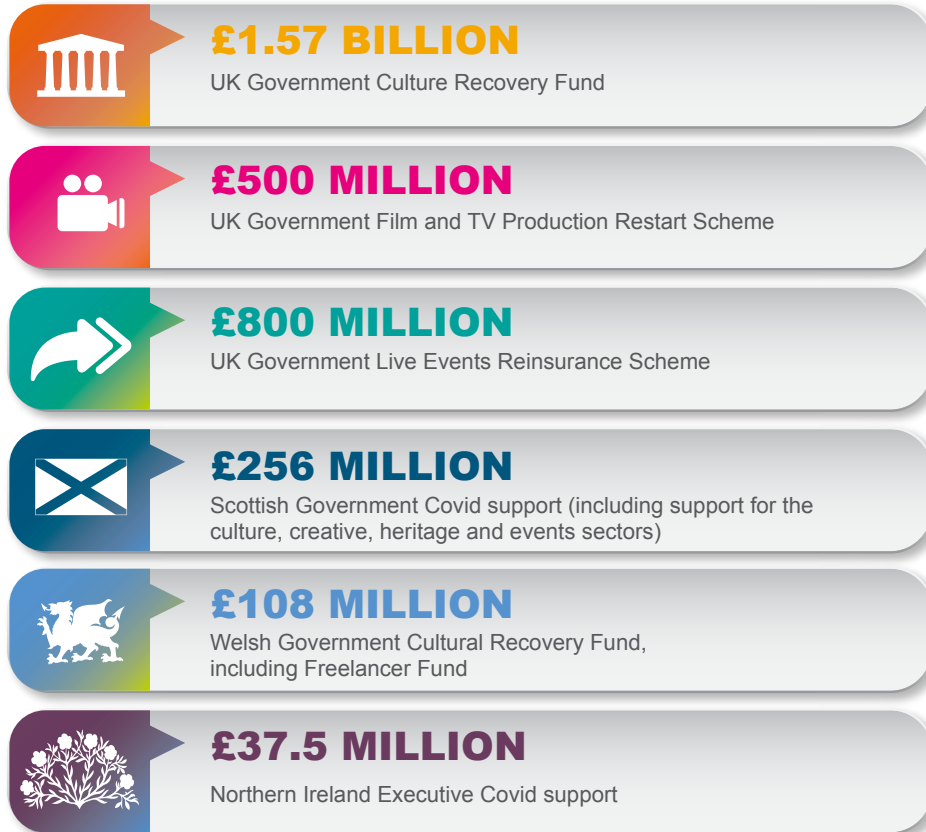
Source: DCMS.

be the key to future growth in the creative industries. Using artificial intelligence (AI) as a tool, building immersive worlds, and developing virtual production will inspire even more incredible content. These wider shifts present an opportunity to leverage the UK's

global technological leadership to turbo-charge growth in the creative industries.

This Sector Vision sets out how the government and industry will work together to unlock the growth potential of the sector by unleashing more investment and building

Covid support made available to the creative industries



Source: DCMS.

the creative businesses and jobs of the future. It will also set out how we can create opportunities, including for young people to participate in creative activities and build careers in the creative industries, as well as how we can enhance the sector's positive impact on our lives and our pride in place. It sets out shared goals and commitments to ensure the sector builds on the success of the last decade.⁷

Our 2030 Goals and Objectives

This Sector Vision sets out **our 2030 goals and objectives** to deliver growth. It is a vision for the creative industries to become an even greater growth engine and where creative talent from all backgrounds, and creative businesses from all areas in the UK, can thrive.

Goal One: Grow creative clusters across the UK, adding £50 billion more in Gross Value Added (GVA)

By 2030, we want to unlock the potential for growth in creative clusters across the UK and to grow opportunities for creative businesses.⁸ Our objectives are:

- **2030 Innovation Objective:** Increased public and private investment in creative industries' innovation, contributing to the UK increasing its R&D expenditure to drive R&D-led innovation.
- **2030 Investment Objective:** Creative businesses reach their growth potential, powered by a step-change in regional investment.
- **2030 Exports Objective:** Creative businesses grow their exports and contribute to the UK reaching £1 trillion exports per year.

Goal Two: Build a highly-skilled, productive and inclusive workforce for the future, supporting one million more jobs across the UK

By 2030, we want to ensure our creative workforce embodies the dynamism and talent of the whole of the UK, while addressing skills gaps and shortages.⁹ Our objectives are:

- **2030 Education Objective:** A foundation of education and opportunities to foster creative talent from a young age.
- **2030 Skills Objective:** Stronger skills and career pathways generate a workforce that meets the industry's skills needs.
- **2030 Job Quality Objective:** All parts of the creative industries are recognised for offering high quality jobs, ensuring a resilient and productive workforce that reflects the whole of the UK.

Goal Three: Maximise the positive impact of the creative industries on individuals and communities, the environment and the UK's global standing

By 2030, we want the creative industries to further enrich lives, create pride in place across the UK, and strengthen our soft power. Our objectives are:

- **2030 Wellbeing Objective:** Creative activities contribute to improved wellbeing, help to strengthen local communities, and promote pride in place.
- **2030 Environment Objective:** Creative industries play a growing role in tackling environmental challenges, helping the UK reach the targets set out in the Powering Up Britain plan.
- **2030 Soft Power Objective:** Creative industries increase their reach to global audiences, strengthening the UK's soft power and positive influence on the world.

Creative Industries Sector Vision: A joint plan to drive growth, build talent and develop skills

These goals and objectives will help deliver the government’s wider growth agenda, as set out in government strategies, papers and [Levelling Up](#) missions to boost living standards, spread opportunities and restore local pride.¹⁰

Actions and Ambitions

To deliver, we need to start now. This is why the government and industry, coordinated by the CIC, are committing to **actions** to create the right foundations to meet our 2030 goals and objectives. This includes almost **£310 million** in public funding since 2021.

Since the 2021 Spending Review, the government has already committed to providing **approximately £233 million** of growth focused public funding to boost

innovation, regional investment, exports, talent and skills.¹¹

As part of the 2023 Creative Industries Growth Moment, the government has committed to more, providing an additional **£77 million** in new government spending and policy announcements to unlock the growth potential of the creative industries and creative clusters across the UK. As with the Sector Deal, the government expects its commitments to lead to larger amounts of private investment into the sector.

This funding is made up of several policies and programmes that government and industry will collaborate on to deliver. This includes the following.¹²



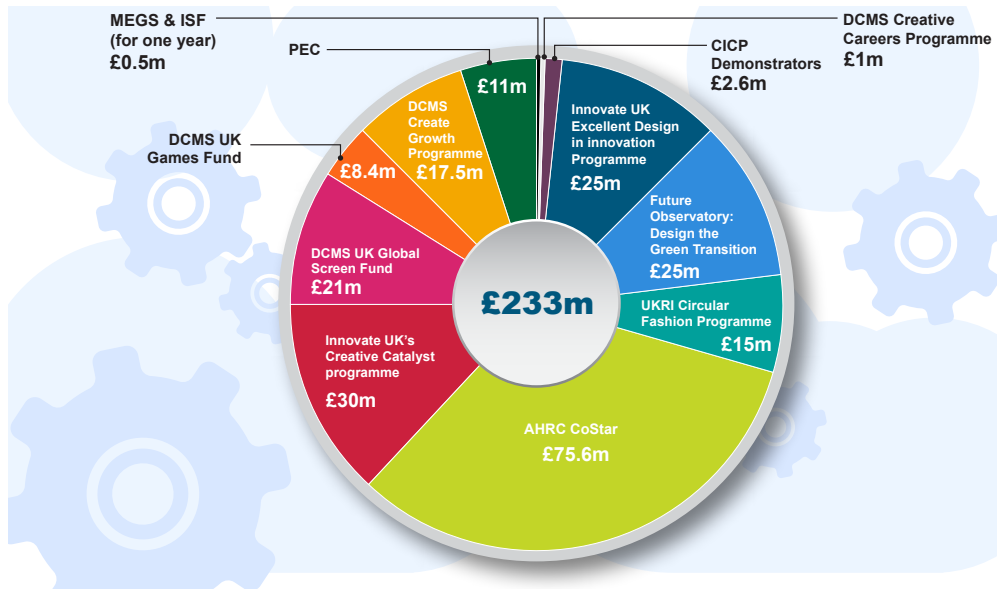
Very Small Creatures production.

Our support will unlock the potential that exists in the creative industries to drive growth across the economy.

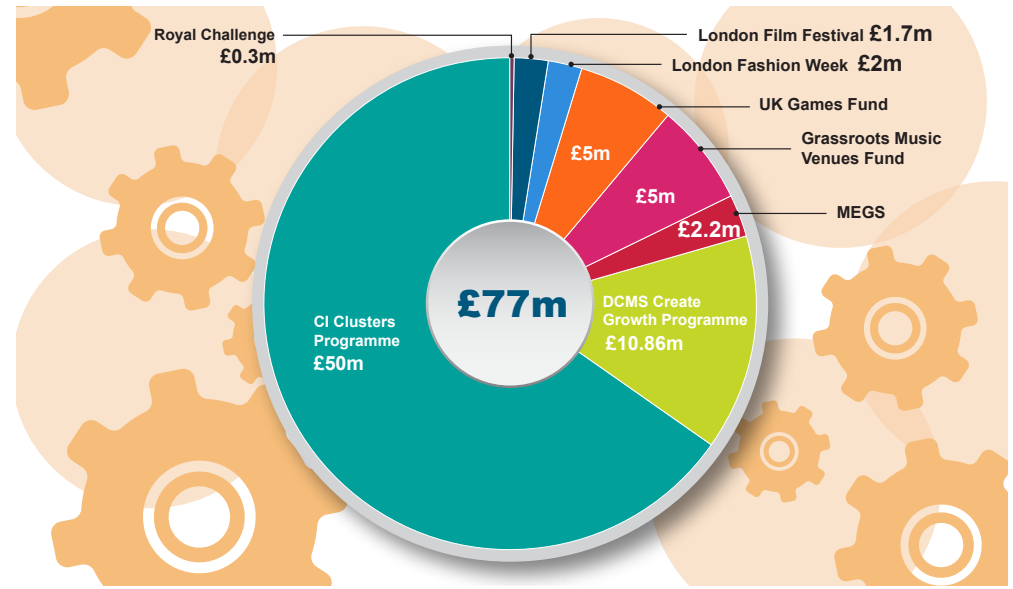
We will:

- deliver the next £50 million wave of the Creative Industries Clusters Programme to support R&D in at least six new clusters.
- provide £75.6 million to set up four new R&D labs and an Insight Foresight Unit across the UK as part of the Convergent Screen Technologies and Performance in Realtime (CoSTAR) programme.
- increase the Create Growth Programme’s (CGP) budget by £10.9 million to a total of £28.4 million to support businesses in another six English regions.
- provide an additional £5 million for the [UK Games Fund](#) to invest in early-stage

Since the 2021 Spending Review



2023 Creative Industries Growth Moment



games studios, bringing its total value to £13.4 million.

- extend and increase funding for Arts Council England’s (ACE) Supporting Grassroots Live Music fund with an additional £5m over the next two years.
- triple the funding for the [Music Export Growth Scheme \(MEGS\)](#) to £3.2 million over 2023-25 to enable emerging artists to break into new international markets.
- in partnership with the Royal Anniversary Trust, launch a challenge designed to encourage innovation and growth in the creative industries.
- welcome the recommendations of the [Pro-innovation Regulation of Technologies Review](#) and make rapid progress to develop a code of practice on text and data mining to ensure creator rights are appropriately protected.

Our creative careers promise will build a pipeline of talent into the creative industries.

We will:

- publish a new Cultural Education Plan (CEP) in 2023, deliver the National Plan for Music Education (NPME) including £25 million for musical instruments, and explore opportunities for enrichment activities as part of the government’s wraparound childcare provision.
- improve creative apprenticeships, with regards to Small and Medium Enterprise (SME) engagement, training provision, relevance of standards and the effectiveness and sustainability of the Flexi-Job Model.
- support the rollout of T-Levels, and complementary high-quality, employer-led Level 3 qualifications that focus on good progression outcomes.



Young people filmmaking.

- work with industry so that they can take advantage of Skills Bootcamps at national and regional levels, and benefit from new Local Skills Improvement Plans (LSIPs) and the forthcoming Lifelong Loan Entitlement.
- set out, with industry, an action plan in response to the Independent [Good Work Review: Job Quality in the Creative Industries](#). The CIC will launch a Charting

Progress Tool to track the effectiveness of diversity and inclusion interventions.

Our support will enhance the creative industries’ ability to enrich lives, create pride in place and strengthen our soft power.

We will:

- deliver on the government’s commitment to support creative excellence – supporting and promoting the very top end of our

cultural and creative output to enhance soft power and boost exports. The government will provide new funding of £2 million to London Fashion Week to support five fashion weeks from 2023-25 and £1.7 million to the London Film Festival 2024.

- deliver the £80 million Research infrastructure for conservation and heritage science (RICHeS) programme to secure

the UK's reputation for excellence in conservation and heritage science.

- deliver the Music Venue Trust's £3.5 million Own Our Venues pilot.
- implement the Broadcasting White Paper, [Up Next](#).
- introduce an industry-led Creative Climate Charter.
- support Bradford to deliver the next UK City of Culture in 2025.

Delivery

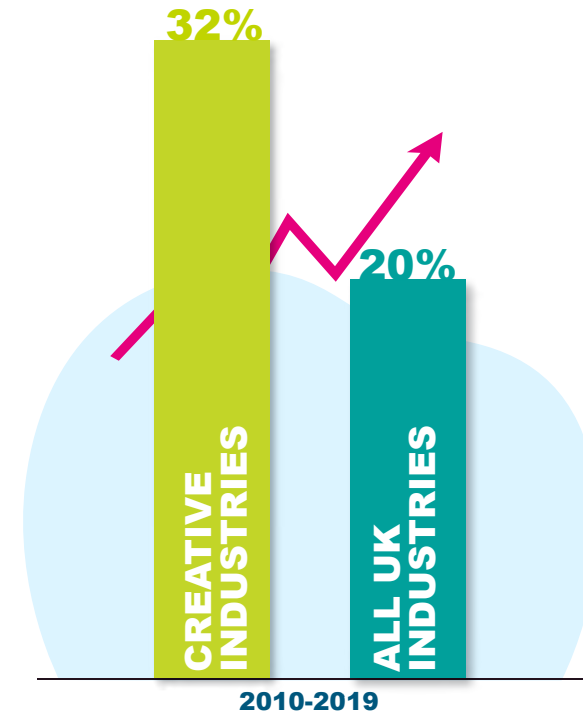
Industry and government will work together to deliver on all of the Sector Vision's 2030 ambitions. The partnership between government and industry will be coordinated through the refreshed CIC co-chaired by Sir Peter Bazalgette and the Secretaries of State for DCMS and Business and Trade (DBT). The CIC will work closely with creative organisations across the UK to achieve our shared goals and objectives. We would like to thank former CIC members for their tremendous contribution and to welcome new

colleagues who will help take this work forward.

We will also strengthen our collaboration with the Local Government Association, local authorities and leaders to support them in the development of local creative industries strategies, building on the examples that the [Greater London](#), [Greater Manchester](#) and the [North of Tyne](#) authorities have set in recent years.¹³ These collaborations will ensure creative businesses can increasingly become the engines of local economies, driving regeneration and creating opportunities for young people.

The government and industry, supported by the publicly-funded Creative Industries Policy and Evidence Centre (PEC), are also committed to further improving the underlying evidence base to inform how we support the sector. The PEC has had a positive impact on our understanding of the sector's profile and economic impact across the UK. The Arts and Humanities Research Council (AHRC) have extended the PEC for another five years with increased funding to £11 million. Effective policy depends on good data.

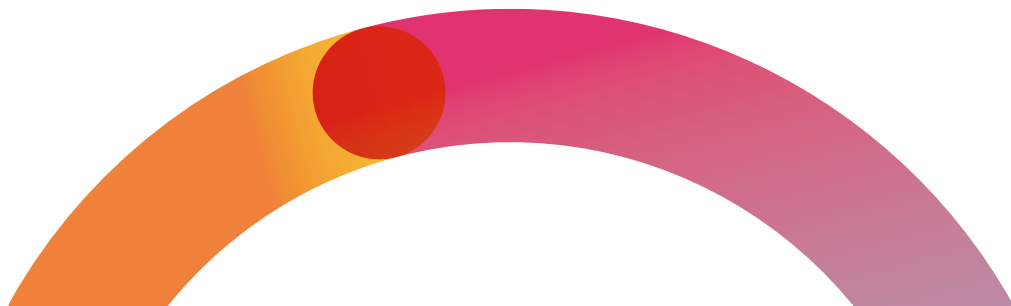
Creative industries output growth (GVA)



Source: DCMS sector economic estimates.



BFI preservation archivist assesses a nitrate film print of Miles Mander's *The First Born* (1928) for restoration.



SCOPE OF THE VISION

“Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property”

The Creative Industries

We were the first in the world to define ‘creative industries’ – as “those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.”¹⁴ The sector’s “individual creativity” is reflected in the large proportion of freelancers in the creative workforce,¹⁵ double that of the rest of the economy.¹⁶ The creative industries are bound together by the generation of intellectual property (IP), which is the engine behind the sector’s sustained growth.

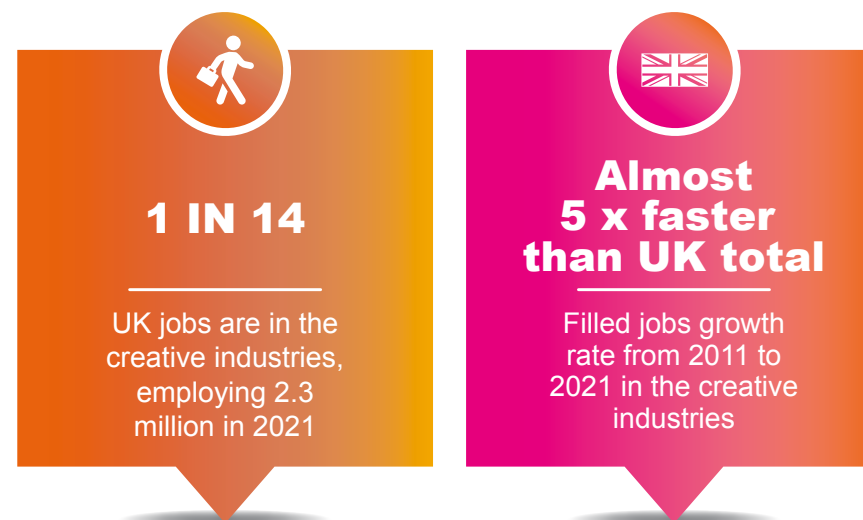
For statistical purposes, DCMS groups the creative industries into nine sub-sectors. However, there are overlaps. For example, ‘TV, radio and publishing’ and ‘IT, software and computer services’ are also included in the government’s definition of the digital sector, exemplifying the importance of digital technologies to the creative industries. Although they may rely more on subsidies than other sub-sectors, ‘performing and visual arts’ and ‘museums, galleries and libraries’ are also included in our definition of the cultural sector, delivering a significant return on that public investment, including wellbeing

impacts (see Chapter 3) and developing talent. Sub-sectoral boundaries are fluid with shared opportunities, particularly where technology and creative skills converge. The TV programmes and films we watch or the video games we play often have their roots in our broader arts and culture.

In this Sector Vision, we cover all the creative industries but with a particular focus on their fastest growing areas, and acknowledging that certain issues require a sub-sectoral response. We recognise that this Vision will not cover all policy areas and will not cover some areas specific to certain creative industries sub-sectors. Different parts of this Sector Vision will also apply to different extents to parts of the creative industries.

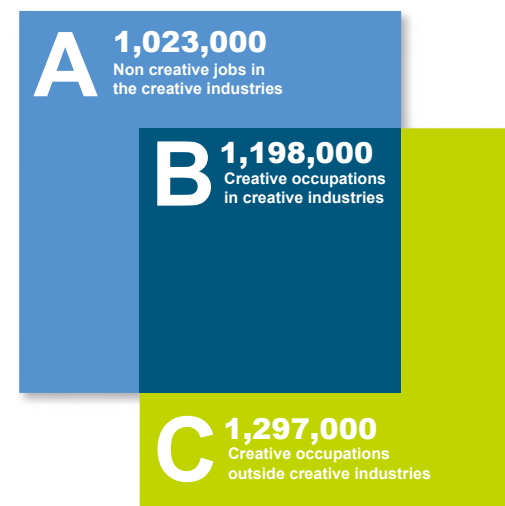
Each sub-sector has its own strengths, but collectively the creative industries are an economic powerhouse. As with all that goes into a great band or a spell-binding catwalk show, bringing together skills from across the sector can deliver the greatest impact. This Sector Vision addresses common challenges and opportunities across the sub-sectors, and capitalises on their shared strengths to maximise their value to our economy, people, places and planet.

Jobs in the creative industries



Source: DCMS sector economic estimates.

Filled employment in the UK creative economy



Total 3.5 million jobs in the UK wider creative economy
Creative Economy = A + B + C
Creative Industries = A + B

Source: DCMS sector economic estimates.

“

The fundamental idea of design is to make the world a better place.

Bruce Mau, designer

”

Devolution

The Sector Vision has been drafted by the UK Government in collaboration with the CIC and with input from the Devolved Administrations of Scotland, Wales and Northern Ireland. This document sets out the UK Government and industry’s ambition to support the creative industries in England and across the UK where policies are reserved. Where we refer to “the government” in this document, we are referring to the UK Government. When we say “we” or “our” in this Vision, we mean the UK Government and industry, represented by the CIC.

The Vision also sets out the UK Government’s and the Devolved Administrations’ ambition to work together to support our world-leading creative industries. We want to collaborate to support and grow the creative industries across the UK – from film and TV production companies in Cardiff and Belfast to fashion designers in Edinburgh and music labels in Liverpool.

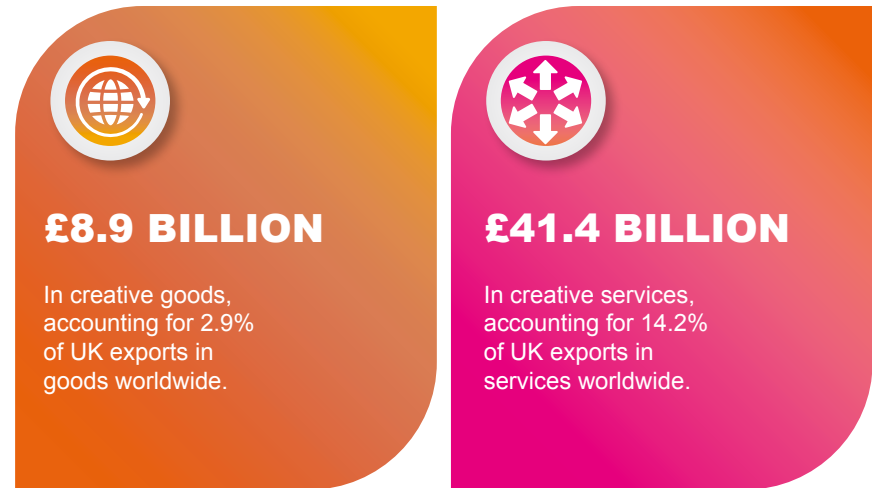
Policy support for the creative industries covers both devolved and reserved areas.¹⁸ In particular, education and training (covered in Chapter Two), health and social care, environment, the majority of culture and arts (covered in Chapter Three), and some areas

of media, economic matters and taxation are all devolved.¹⁹ By contrast, the majority of media, financial and economic, employment, and trade and industry matters (covered in Chapter One) are reserved for the UK Government.²⁰

In devolved areas, the Devolved Administrations have individual strategies and policies to support the creative industries, which have been set out in boxes in each chapter. In these areas, our ambition is to work together to share best practice and, where possible, align goals to ensure we provide coherent support to the creative industries across the UK. We will look to deepen collaboration between Scotland, Wales, Northern Ireland and England through the refreshed CIC, which now has a new membership that ensures each nation is represented. The UK Government and Devolved Administrations will set up an Inter-Ministerial Group on Culture and Creative Industries to identify opportunities to work together, share best practices and work constructively through issues.

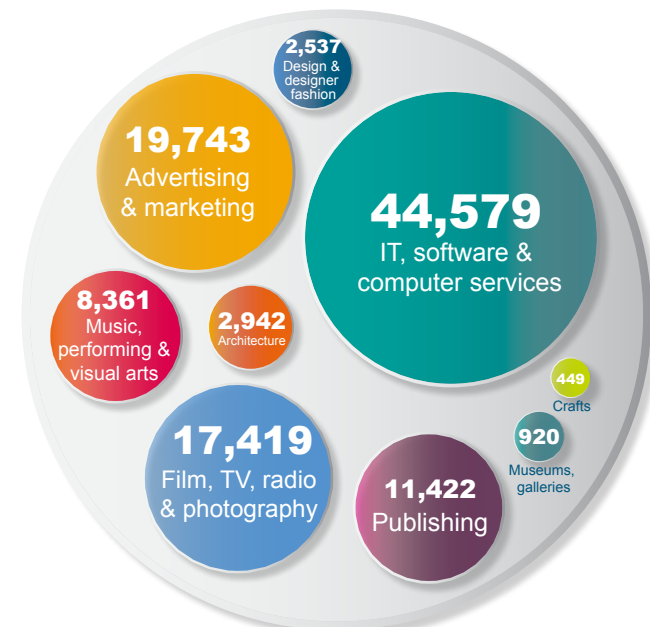
In this Vision, we discuss a range of programmes which are both devolved and UK-wide. We have included a list of actions and programmes covered by this Sector Vision in Annex A, specifying whether they are UK-wide or England only.

2020 creative industries exports



Source: DCMS.

UK creative industries GVA 2021 (£m)



Source: DCMS.

CHAPTER ONE: GROWTH

Goal One: Grow creative clusters across the UK, adding £50 billion more in gross value added (GVA)

In 2030, we want to see dynamic creative clusters driving growth and employment across the UK. In our towns and cities, the creative industries already represent an increasing share of local employment and businesses. We will accelerate this trend by supporting ecosystems of creators, businesses and investors to innovate and harness new technologies, to secure the investment they need to fulfil their growth ambitions and to access markets across the world.

The creative industries are a major driver of UK economic growth and can play an important role in levelling up the country.²¹ The sector showed strong growth over the last decade, rebounding after the pandemic, and is expected to continue to grow over the next decade.²² However, this future growth cannot be taken for granted and circumstances can change quickly, as demonstrated by recent high inflation both increasing costs for businesses and impacting household spending.²³ We therefore cannot rely on past success. We need to build on the support we have provided to unlock the sector's future growth potential.

Key to future growth is embracing technological change and the creative industries are at the forefront of this work with innovation being central to the creative process. Creative businesses spent £3.3 billion on R&D in 2020, equivalent to 3.2% of the total GVA of the creative industries and a greater proportion than the UK economy average of 2.3%.²⁴ The technologies of the Fourth Industrial Revolution,

such as AI and virtual reality, will continue to radically alter creative production processes, consumption patterns and business models.²⁵ As set out in the government's [National AI Strategy](#), the UK has an opportunity over the next ten years to position itself as the best place to live and work with AI.

The creative industries can help achieve this as the increasing digitisation of creative content opens up opportunities for the application of AI and machine learning.²⁶ Working together, we can ensure the creative industries can weather economic storms and make the most of these opportunities. We must also recognise the importance of supporting creative exports to reach even broader audiences, increase the consumption of more British content and drive growth for our products.

To maximise growth, we must also look at where our creative businesses are located. Successful creative industries have a tendency to cluster, from the video game sector in Leamington Spa to the community of architects based in Liverpool. Our public

service broadcasters have also been vital to the development of creative clusters across the UK and indeed analysis has found that a 1% increase in the BBC's local footprint results in a 4.5% increase in the rate of cluster growth in the creative sector as a whole.²⁷

DCMS-commissioned research, carried out by Frontier Economics, identified 55 creative clusters across the UK and further analysis finds that over 90% of creative industries turnover is generated within these clusters.^{28 29} The PEC also identified a further 709 micro-clusters from the Shetland Islands to Penzance.³⁰

Clustering can improve access to a skilled workforce, supply chains and customers, as well as creating stronger ties and knowledge sharing between creative businesses, workers and institutions.³¹ As a result, creative businesses in creative clusters are shown to grow faster than those not located in creative clusters.³² Non-creative businesses also tend to benefit from their close proximity to creative businesses.³³

However, there are significant disparities in cluster size, with London currently accounting for more than 50% of the sector's economic output.³⁴ We will work to open up opportunities and accelerate growth right across the UK, supporting the government's levelling up ambitions.

While there is no 'one size fits all' approach to growing clusters, DCMS-commissioned research has identified five key drivers: innovation, investment, talent and skills, exporting and the wider business environment.³⁵ By supporting these drivers, we can create the conditions for the sector to thrive in clusters across the UK. Focusing solely on one of the drivers will not be enough. For instance, improving local skills without also nurturing local businesses risks accelerating the brain drain from the area.

Chapter Two will cover access to talent and skills, while in Chapter One we focus on the three objectives of **innovation, investment and exports**.



Burberry Spring/Summer 2021 Finale.

- Innovation is the seed of growth. We need to back innovative creative businesses that have the potential to be world-leading; government R&D support is crucial to stimulating private investment in these firms. By bolstering innovation across the creative industries and enabling businesses to develop new products and ideas, we can make the most of new technologies and changing markets.
- Investment is the fertiliser of growth. By building knowledgeable and engaged investor communities across the UK, and by ensuring creative entrepreneurs and businesses have the skills and knowledge to access finance, we can create the right environment for investment to help creative businesses scale up and grow.
- Exports enable creative firms to grow their markets and ambitions. By supporting access to new international markets, improving export skills and knowledge, and seeking beneficial terms in future free trade agreements, the sector can maximise its international competitiveness.³⁶

As for the fifth driver of cluster growth, the wider **business environment** relates to the context (physical, social, digital, legal) in which creative businesses operate.³⁷ Many of these are not specific to the creative



Oliver Hymans, marionette maker.

industries and so are outside the scope of this Vision, however they are the focus of wider government initiatives such as:

- [Spring Budget 2023](#)
- [Autumn Statement 2022](#)
- [Energy Bills Discount Scheme](#)
- [UK Digital Strategy](#)
- [UK Innovation Strategy](#)
- [Levelling Up White Paper](#)
- [Export Strategy](#)
- [5G](#) and [Project Gigabit](#) rollout

Central to our business environment is the UK's IP framework. It is what allows creators and creative businesses to monetise their content and grow. We are committed to ensuring high levels of copyright protection and will continue to strive for a licensing framework that works for all. We will also continue to provide support through the following opportunities:

- The British Library's [Business and IP Centre](#) national network which provides entrepreneurs and businesses with business support and advice on IP.
- The British Library also delivers the [Get Ready for Business Growth](#) programme with ACE which includes teaching businesses how to maximise their IP.
- We continue to look for opportunities to ensure the UK's IP framework keeps pace with technological change and continues to incentivise the commercialisation of creative ideas.
- We also understand that technology must advance in harmony with the creative sector to ensure creators are not unintentionally negatively impacted by these advancements. For example, the [UK International Technology Strategy](#) also sets



Staff at Rebellion using games development equipment.

out that the government will promote the responsible development of AI and shape global AI governance in line with the UK's values and priorities.

Similarly, the UK's competition regime ensures a fair and level playing field, including for small creative businesses and those starting up and entering the market. The [Digital Markets, Competition and Consumers Bill](#) aims to ensure the UK continues to lead the world by taking a targeted and innovation-friendly approach to competition issues in digital markets. In parallel, the Competition and Markets Authority (CMA) will continue to ensure competition is working to the benefit of consumers across markets, as it has recently in the context of music streaming.³⁸

The 2020 Autumn Statement and 2023 Spring Budget also outlined cross-economy

actions to support innovation. Investment Zones will catalyse growth in some of the highest potential growth clusters, including by leveraging local research strengths. The creative industries are highlighted as one of the programme's priority growth sectors. Meanwhile, a 35% increase in funding for UK Catapults, totalling £1.6 billion, will de-risk commercial delivery, accelerate innovation clusters and draw in private investment.

Finally, the government has recently closed the consultation which sought views on the design of a simplified R&D tax relief scheme, merging the existing R&D expenditure credit and the SME R&D relief. While the government is considering the response to the consultation, the government will publish draft legislation of a merged scheme for the technical consultation, with any decision being made at a subsequent fiscal event.

“
To write is human, to edit is divine.

Stephen King, author

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Devolved Administrations' Growth Policies

Scotland

The Scottish Government is committed to supporting creative industries' growth, in particular by unlocking innovation. Following the publication of the [Scottish Technology Ecosystem Review](#), the Scottish Government has committed £60 million to implement the report's recommendations to support infrastructure, education and fund enabling organisations and activities. This includes £42 million to create seven Technology Hubs across Scotland to help creative tech businesses, including video games, to access advice and support such as [Tech Scaler](#). To support creative businesses, the Scottish Government has delivered the £1 million [Creative Digital Initiative](#) to upskill their digital capabilities and grow, including over £290,000 to Creative Scotland to deliver a digital commissioning programme via [The Space](#), a [Digital Pivot mentoring and peer support programme](#), and the [Next Level Up programme](#).

Wales

The Welsh Government is prioritising creative industries growth in its [Programme for Government](#). As part of this, they launched a new [Production Fund](#), which has supported 31 screen productions, with £16.7 million creating £187 million in local economic impact and nurturing Welsh screen exports. The Welsh Government is organising trade missions to unlock further opportunities for the sector in overseas markets. Creative Wales has also co-funded the media.cymru programme to drive inclusive and sustainable economic development of the third largest media cluster in the UK which is located in the Cardiff Capital Region.

Northern Ireland

The Northern Ireland Executive is supporting the growth of creative clusters through its [10X Economic Vision](#), in particular digital, ICT and creative industries clusters that have the potential to grow through innovation. This includes significant annual investment in the screen sector to support production, content development and infrastructure. In September 2022, the Executive announced an investment of over £25 million in [Studio Ulster](#), a cutting edge large scale virtual production studio, as part of the [Belfast Region City Deal](#).

2030 Innovation Objective: Increased public and private investment in creative industries' innovation, contributing to the UK increasing its R&D expenditure to drive R&D-led innovation

In the [UK Innovation Strategy](#) the creative industries are identified as critical to the government's ambition to make the UK a global hub for innovation. Creative firms are engaging in innovation at a higher rate than other sectors and are more productive than the UK average.^{39 40}

The creative industries spend the equivalent of 3.2% of the creative industries' total GVA on R&D. But we can go much further, including by supporting innovation to leverage the latest wave of digital technologies.⁴¹ For instance, Digital Catapult is focusing on the creative industries to build the sector's capabilities in areas such as AI and immersive technology. Through the development of innovation and acceleration programmes, and the testing and trialling of new R&D capabilities, the Catapult is expanding the UK's creative and advanced media production economy.

We also need to make the most of universities, their ability to champion spin-outs and their ability to enrich local SMEs with their applied research. For example, both the number and value of equity investments secured by academic spinouts has increased significantly over the last decade, rising from 209 deals with a combined total value of £405 million in 2012 to 389 deals worth £2.54 billion in 2021.⁴²

Creative businesses that are developing new technologies or adapting existing technologies in novel ways ('Createch' businesses) have seen similar upwards growth trajectories to other



John Lewis Christmas advert 2021.



Alessandro Michele, Gucci, and Roblox creators nominated for the Fashion Award for Metaverse Design at The Fashion Awards.

tech companies.⁴³ However, they undertake R&D activity in different ways to traditional tech companies, from the technology they use to how they spend on R&D.⁴⁴

Increasing innovation in the sector will lead not only to growth within the sector, but also across the economy. Evidence suggests that greater links to the creative industries and their innovative new ideas, through supply chains and labour movements between industries, also increases innovation for non-creative firms. Firms that have above average connection to the creative industries both undertake more innovation activity and have a higher probability of successful innovation. There are therefore 'spillover' benefits from the creative industries that improve the outcomes of other firms and the wider economy.

Recent research suggests that, due to these positive spillovers not being accounted for, creative industries firms will undervalue and underproduce their own innovations.⁴⁵

A DCMS-commissioned report carried out by the Design Council documents how creative technologies are being used by non-creative sectors, such as real-time 3D rendering used by property developers and healthcare providers.⁴⁶ The research also highlights that creative skills are increasingly used in non-creative sectors, such as design skills utilised in manufacturing and logistics. It is therefore not surprising that the [Royal College of Art](#) is in the top ten for spinout start-ups in the UK, with new creative enterprises not just in the creative industries, but also in agriculture, construction and healthcare.⁴⁷

However, some creative businesses – in particular the micro-businesses that make up 94% of companies in the creative industries – often do not have the resources, infrastructure or capabilities to innovate effectively. They may also choose not to invest in innovation if they are concerned that their creations will be copied and their IP infringed.^{48 49 50}

The government and industry have demonstrated how we can leverage public funding, the UK's world-leading university base, and the creative sector's ingenuity to overcome these challenges and achieve a step-change in R&D investment. The UK Research and Innovation (UKRI) Creative Industries Clusters Programme, Audience of the Future Programme and Creative Industries Fund provided infrastructure and investment to help creative businesses innovate. As part of the Department for Science, Innovation and Technology's (DSIT) [Innovation Accelerators](#) pilot, new projects in Greater Manchester and the Glasgow City Region will develop innovation in immersive technologies and museums in the metaverse.

The Intellectual Property Office (IPO) has also tackled online infringements of IP through the UK's world-leading IP framework and by bringing together creative industries and digital platforms to better understand online infringements and agreeing actions where appropriate. In 2017, the IPO helped broker an agreed Voluntary Code of Practice between search engines and creative industries, dedicated to the removal of links to infringing content from the first page of search results.

Likewise, following the 2018 Sector Deal, the IPO facilitated roundtable discussions between social media platforms and UK creative

businesses on new approaches to prevent piracy. These roundtables served to increase trust and collaboration across industry and government, whilst identifying new policies to further reduce piracy online. The roundtables raised the profile of existing measures available to block or remove infringements, and led to the identification of preventative policies, such as the removal of piracy tutorial videos from platforms and procedures to prevent links to rogue piracy sites.

Actions and Ambitions

To achieve our 2030 Innovation Objective, we will work together with key partners such as investors, universities and local authorities to encourage R&D across all creative businesses and nurture creative entrepreneurship. The government will also continue to facilitate a close dialogue between the creative and technology sectors to ensure our IP framework enables them to grow together in partnership.

Headline actions⁵¹

- UKRI and DSIT will deliver the next £50 million wave of the Creative Industries Clusters Programme to support R&D in at least six new clusters.
- AHRC, in partnership with universities and creative businesses from across the UK, is delivering the new £75.6 million Convergent Screen Technologies and Performance in Realtime (CoSTAR) programme over six years. CoSTAR will provide a new national infrastructure to drive the next generation of R&D for building creative and digital economies. In June 2023, UKRI announced the preferred bidders for: the national CoSTAR lab led by Royal Holloway University of London which



CI Labs #7: The Sound of Data.

will be based at Pinewood Studios; three new network labs, one led by University of York to be based at Production Park in West Yorkshire; one led by Abertay University to be located in Dundee, and a third led by Ulster University based at Studio Ulster in Belfast; and a new Insight and Foresight Unit led by Goldsmiths and the British Film Institute (BFI). This announcement is matched by £63 million of co-investment, bringing total Government and industry investment in CoSTAR to over £138 million.

- Through a code of practice for text and data mining, we will help to ensure the UK copyright framework continues

to promote and reward investment in creativity, while also meeting our ambition to make the UK a world leader in research and AI innovation. We want rights holders to be assured that their content is appropriately protected under the existing copyright framework, with reasonable opportunity to monetise that content, and we want to ensure AI-generated outputs are labelled appropriately to provide confidence in the origin of creative content. We are aiming for a principles-based code, to be published in draft before the summer Parliamentary recess.



Staff at Rebellion using games development equipment

- The government, in partnership with the Royal Anniversary Trust, will launch a challenge designed to encourage innovation and growth in the creative industries. It will bring together the brightest minds from academia and industry to address challenges and opportunities the sector faces from emerging technologies, in order to identify solutions.
- We welcome the recommendations of the [Pro-innovation Regulation of Technologies Review](#).

In addition, we will:

Ensure that businesses in creative clusters across the UK are incentivised to invest in R&D and innovation.

- Innovate UK is delivering the £30 million Creative Catalyst to support creative businesses to develop and commercialise breakthrough ideas. Innovate UK have announced the winners from the 2023 round of the Creative Catalyst which will provide funding of up to £50,000 for over 200 creative businesses across the UK to invest in innovation, with 55% of funding being delivered to regions outside of the Greater Southeast.
- Innovate UK is delivering a £25 million Design in Innovation programme to inspire and invest in excellent design for innovation across the economy.
- AHRC, with co-funding from DCMS, has awarded an additional £2.5 million to explore options for expanding the R&D model into new areas and sectors, giving a further boost to creative businesses, spreading more jobs across the country, and testing new potential areas for investment.

“

Music is life itself.

Louis Armstrong, musician

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- Through programmes like [Bridge AI](#), Innovate UK will invest in a number of activities to stimulate the adoption and diffusion of AI in a number of high growth potential sectors, including the creative industries. This will increase productivity and support the UK's transition to an AI-enabled economy.
- Through the [Creative Research Capability](#) programme, AHRC has also recently awarded £14.4 million to Higher Education Institutions across the UK to support R&D capabilities for the creative economy, focusing on practice research in fashion, design, and music.
- AHRC, ACE, Arts Council of Northern Ireland, Creative Scotland and Arts Council of Wales are working together to support the adoption and implementation of creative immersive technologies within the arts and culture sector across the UK, building on the learning and successes of the CreativeXR, and Creative Industries Clusters programmes. A consortium of research organisations, cultural organisations and creative businesses will deliver a £6 million, three-year creative

research and development innovation programme, featuring a pipeline of funding opportunities to support organisations and individuals at different scales and readiness, leading to new immersive innovations.

Work with industry to ensure that the UK's creative IP rights are the best protected in the world, setting the gold standard globally.

- Between 2020 and 2023 DCMS invested £13 million into the expansion and acceleration of the British Library's Business and IP Centre network. Delivered through public libraries, it provides business support for creative businesses as well as advice on how to protect their IP.
- DSIT, IPO and DCMS will ensure a robust IP framework, including through the [Counter-Infringement Strategy](#) and continued provision of tailored IP tools and training products to help creative firms protect and maximise their IP.
- Building on the previous roundtables, the government will actively engage

with the tech and creative sectors to explore potential Know Your Business Customer requirements and consider issues highlighted by the CMA, such as online platforms taking proactive steps to tackle infringing content facilitated through their platforms.

Work with industry to develop comprehensive data and evidence on creative industries' R&D and innovation.

- Learning from the significant progress already made to understand creative R&D and innovation, we will work with academia and the PEC to develop granular data on the types of R&D undertaken and its economic benefits.
- We welcome the proposal from the Prime Minister's [Council for Science and Technology](#) – the Prime Minister's independent scientific advisory Council – to develop advice. The government commits to engaging with the Council to inform further action to support R&D, innovation and technology in the creative industries.

Case Study: Edinburgh's Creative Informatics

UKRI's £56.8 million Creative Industries Clusters programme has supported nine creative clusters in the UK. Collectively, these research and innovation clusters have generated £252 million of public and private co-investment, engaged over 2,500 businesses and 60 research organisations and supported 900 business R&D projects. These projects create new products and experiences that give regional businesses a competitive advantage and a chance to scale up.

Creative Informatics is one of the nine clusters. Based in Edinburgh with co-investment from Creative Scotland, it focused on nurturing the city's world class creative and tech sectors. It has supported a range of companies to undertake more R&D and to embed it at the heart of their business activity. One such company is TouchLab, which applied for funding to qualify for the £10 million Avatar XPrize competition for creating physical robotic avatar systems. Combining advanced robotics with virtual reality interfaces developed in the creative industries, TouchLab gives users an immersive experience when controlling a remote avatar. It could be essential when, for instance, working remotely in disaster areas.

TouchLab is now based at the Higgs Centre for Innovation business incubator, which is funded by the Science Technology Facilities Council, and has recently secured £3.5 million investment from Octopus Ventures. They have developed the potential use of their technology in other sectors such as healthcare and nuclear decommissioning. Examples like this demonstrate that creative solutions developed within clusters are often able to benefit not just creative companies but the wider economy.

“

The UK video games industry is a fantastic success story and continues to punch above its weight.

Sir Ian Livingstone, British creator of Eureka!

”





Cardiff Ice Arena. Architect: Scott Brownrigg.

2030 Investment Objective: Creative businesses reach their growth potential, powered by a step-change in regional investment

In the [Levelling Up White Paper](#), the government outlined its priority to boost productivity, pay, jobs and living standards across the UK. The creative industries are critical to meeting this ambition with investment pouring into many parts of the sector, enabling business expansion.

Some creative sub-sectors have proven incredibly successful at securing inward investment. UK film and high-end TV production spend reached £6.3 billion in 2022, the highest on record, and £1.8 billion higher than in 2019. £5.4 billion of this was driven by inward investment, highlighting the UK's reputation for world-leading film and TV production.⁵²

To meet this demand, studio facilities have expanded across the UK. For example, in 2021 Pinewood Studios [announced](#) the expansion of its iconic Shepperton Studios – with approximately one million square feet of new production space. This space has now been leased on long-term contracts with commitments from both Amazon Prime Video and Netflix. More widely, one study in 2021 concluded that Createch firms – creative businesses that use technology – raised a record of nearly £1 billion in venture capital in 2020, putting the UK third in the world for Createch investment, behind China and the US.⁵³

While parts of the creative industries are attractive to investors, many entrepreneurs and creative businesses find it hard to access investment.⁵⁴ The value of creative businesses commonly lies in their intangible IP, which can be hard to value, and project-based business models often create peaks and troughs of

activity and revenue.⁵⁵ Moreover, some products such as music or films can be 'hits'-based, with unpredictable consumer demand. These factors, coupled with a lack of market intelligence and data, can make creative businesses appear a risky proposition to investors.

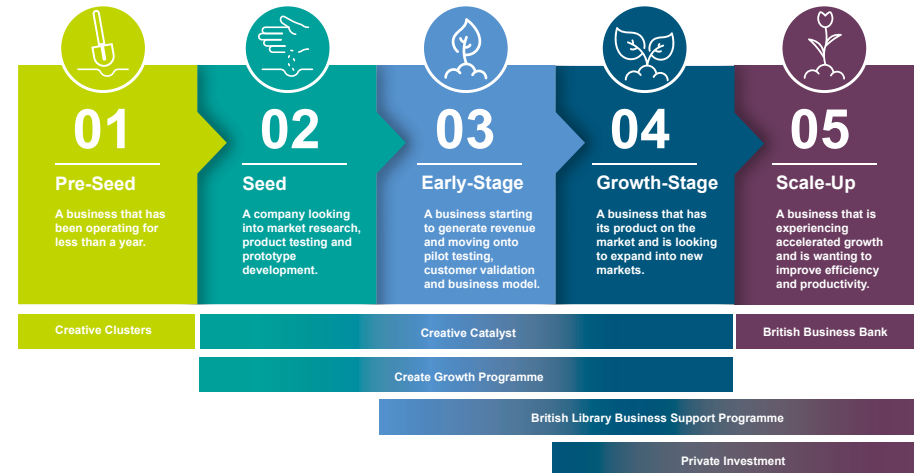
These challenges are felt more keenly outside of London, with early stage equity finance and venture capital investors much less prevalent.⁵⁶ The government and industry will work together to improve data on investment into the sector, to improve benchmarking against other sectors, and to better understand new and emerging business models and their finance needs.

Creative industries sub-sectors are highly entrepreneurial, which is a key source of the sector's dynamism, but can also come with a relative lack of experience or skills in raising outside investment. It is critical to ensure we nurture new creative entrepreneurs with the right support. For example, the BFI has committed £54 million of National Lottery

funding between 2023-26 to its Filmmakers funds, as set out in their [National Lottery Funding Plan \(2023-26\)](#).

Previous government and industry support has looked to tackle these challenges. The government's creative industries tax reliefs, including the audiovisual ones, have been vital to the sector's growth.^{57 58} The British Business Bank (BBB) has across its programmes to date provided over £4 billion of finance to more than 6,800 creative businesses to help them grow and access investment.⁵⁹ From 2018 to 2021, DCMS piloted the £4 million Creative Scale-Up Programme, which supported over 200 creative businesses in three regions in England in accessing angel investment. Local authorities have also worked with industry to deliver locally-led initiatives, such as the [North of Tyne's Culture and Creative Investment Programme](#), delivered in partnership with Creative UK. This provides specialised support for creative businesses to win investment.

5 steps of a creative business



Source: DCMS sector economic estimates.

Actions and Ambitions

To achieve our 2030 objective, we will go further and increase investment into start-ups and creative businesses across the UK. We will work with the BBB and local authorities to strengthen business skills and encourage investor communities, at home and abroad, to invest in UK creative businesses.

Headline Actions

- The government is committed to ensuring the audio-visual tax reliefs remain world-leading and continue to best serve the needs of creative companies. As set out in [the Audio-Visual Tax Reliefs consultation response](#), the government is considering the case for further targeted support for visual effects work, and will provide an update on this later in the year.
- DCMS will provide £10.9 million in additional funding between 2023 and 2025 to expand the [Create Growth Programme](#) into a £28.4 million programme. The CGP will grow from six to twelve English regions outside of London, supporting over 2,000 businesses to access private investment and scale up, turning today's start-up founders into tomorrow's CEOs. The CGP recently awarded more than £3 million to over 100 businesses spread across the six regions currently covered by the programme.
- DCMS will provide an additional £5 million, between 2023 and 2025, for the [UK Games Fund](#) to invest in early-stage games studios, bringing its total value to £13.4 million.
- DCMS and ACE will extend and increase funding for Arts Council England's (ACE) Supporting Grassroots Live Music fund

with an additional £5m over the next two years. This will support grassroots music venues, the lifeblood of our world-leading music sector and cornerstones of communities. We will work together to identify options to secure the longer-term sustainability of grassroots music venues.

In addition, we will:

Drive increased investment into creative businesses across the UK.

- The government will maintain the UK's competitive offer of creative industries tax reliefs to support and incentivise production in the UK. HM Treasury (HMT) announced reforms to the audiovisual tax reliefs at the 2023 Spring Budget, which included increased credit rates for film, high-end TV and video games (34%) and animation and children's TV (39%).⁶⁰ The government has also extended the higher rates of Theatre Tax Relief, Orchestra Tax Relief and Museums and Galleries Exhibitions Tax Relief for a further two years until 31 March 2025.
- Creative businesses will continue to be able to access the BBB's £1.6 billion [Regional Investment Funds](#) and £150 million [Regional Angels Programme](#). These will develop and support investor communities, encouraging them to back creative businesses across the UK, turbo-charging investments in the most promising and fastest growing creative start-ups and scale ups.
- The BBC's [Across the UK](#) plan will see an additional £700 million investment outside of London, supporting business and creating jobs.⁶¹
- The Department for Levelling Up, Housing and Communities (DLUHC) launched a



Cinemasgoers pick up film tickets at Oxford's Ultimate Picture Palace.

[consultation](#) on permitted development rights that proposes further flexibilities for filmmaking at temporary sites. DLUHC will consider the evidence and decide on next steps.

Ensure that creative entrepreneurs and firms have the skills to grow and access investment and nurture new forms of creative entrepreneurship.

- DBT and BBB will continue to deliver [Help to Grow: Management](#). This programme is designed to give businesses the tools and skills they need to raise private investment and turbo-charge their growth.
- The government, industry and the BBB will collaborate so that current and future programmes and funds continue to support creative businesses at all growth stages across all regions of the UK.

- We will promote our offer to support creative businesses to access finance and insurance to win contracts, fulfil orders, and get paid for their exports of goods, services and intangibles such as intellectual property.

Empower local areas with the provision of resources to support place-based creative industries development and to unlock further investment.

- Local areas will be able to access resources through pan-economy programmes where their local priorities align with these funds, such as DLUHC's [UK Shared Prosperity Fund](#) and DCMS's [Cultural Development Fund](#) (England only), and we will support these programmes to accelerate creative cluster growth.
- We are supporting local partners to consider how the creative industries could

feature within new Investment Zones proposals, to maximise the potential of local creative strengths and boost growth and productivity.

- We will work with the PEC to build on their [Resources for Local Authorities](#) and provide enhanced data and evidence to understand local business environments and creative clusters, which also supports

local authorities' decision-making alongside access to industry insights and expertise.⁶²

- We will strengthen partnerships with areas that are ambitious to support their creative industries development and build local knowledge and skills, through programmes such as the CGP and North of Tyne Culture and Creative Investment Programme (see case study).

Case Study: Programmes empowering local areas

The government, local authorities and industry are supporting local regions to help them grow their creative clusters and create jobs. In 2022, DCMS announced the £17.5 million Create Growth Programme (CGP), in partnership with Innovate UK and six regions in England. Supported by industry, the CGP will empower Greater Manchester, South East Coast, the West of England, Norfolk and Suffolk, Leicestershire and parts of North East of England to support their creative businesses to attract private investment through a combination of capital, business support and investor capacity building. In 2023, the CGP awarded more than £3 million to over 100 businesses spread across the six regions. The CGP will receive a further £10.9 million to expand its territorial scope from six to twelve regions.

The CGP expands on the DCMS-funded £4 million Creative Scale-Up (CSU) pilot programme, which supported creative businesses in the West Midlands, West of England and Greater Manchester from 2019 to 2022. One company that benefited from the CSU was Blake Mill Ltd, a fashion and design company based in Manchester, which creates ethically produced men's clothing. Thanks to the workshops and mentoring provided by CSU, Blake Mill Ltd gained an understanding of how to use IP and they have since increased their profitability and doubled their export activity.

The CGP is complementing existing programmes in local areas. For example, in the North of Tyne, the Culture and Creative Investment Programme is unlocking creative businesses' growth at every stage of their journey and supporting freelancers in North Tyneside, Northumberland and Newcastle. Funded by the North of Tyne Combined Authority, the programme offers specialised investment in the form of £500,000 of grants, £625,000 of equity finance and £1.5 million of flexible loans. This includes an easy-to-access, fixed-term, unsecured loan offer called Creative Boost. It also includes a challenge fund and a tailored programme of business support and mentoring.

2030 Exports Objective: Creative businesses grow their exports and contribute to the UK reaching £1 trillion exports per year

The government's [Export Strategy](#) sets the goal for the UK to reach £1 trillion in total annual UK exports by the mid-2030s and to boost competitiveness and jobs across the UK.⁶³ The creative industries are identified as a priority sector to deliver this ambition with opportunities for the government and industry, in partnership, to grow exports and reach new markets.

The UK is a world leader in creative exports,⁶⁴ with the creative industries exporting £8.9 billion in goods and £41.4 billion in services in 2020.⁶⁵ Creative services exports in particular have increased rapidly in recent years, amounting to 14.2% of total UK services exports.⁶⁶ In the future, increasing digitisation and greater use of new technologies will generate more opportunities for UK creative businesses, with almost 90% of global growth between 2021 and 2026 expected to be outside the European Union (EU).⁶⁷ With the UK's new trading independence, we aim to be more agile in working to increase our presence in high growth and emerging markets, while maintaining close relationships with Europe and North America.⁶⁸

“ [Our screen industries] used to be a cottage industry, but now we're on a par with manufacturing.

Ben Roberts, CEO, British Film Institute

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While there are proportionally more exporters in the creative industries than in most other sectors, many creative businesses face challenges in exporting.⁶⁹ There are strong regional differences, with over half of creative industry exporters based in London and the South East.⁷⁰ Structural factors, such as a predominance of micro-businesses and reliance on intangible assets like IP, mean that creative businesses often lack the resources and skills to investigate and enter new markets. This is particularly the case in riskier markets, where there may be trade barriers, such as reduced enforcement of IP rights.⁷¹ Creative businesses also need to adapt to new trading rules with European markets following the UK's departure from the EU. An example would be creatives looking to tour EU Member States.

Support to help creative businesses overcome challenges to export has come in several forms. Active assistance for businesses is vital, which the DBT and DCMS channel through a variety of initiatives and programmes. Having left the EU, the government has agreed ambitious Free Trade Agreements (FTAs), including with Japan, Australia and New Zealand, which include provisions to support creative businesses to trade in important markets. For example, in the UK-New Zealand



Design Researchers in Residence: Restore, a display at the Design Museum curated by Future Observatory, 2022.

FTA, New Zealand committed to extending the term of copyright by 20 years for authors. We have also agreed a deal on mobility with Australia, giving greater certainty about working in Australia to deliver services on a temporary basis. We are also working on ambitious deals with India, Canada, Mexico, Israel, the Gulf Cooperation Council, South Korea and Switzerland. The government has also substantially concluded accession negotiations to join the eleven countries in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).

Actions and Ambitions

To achieve our 2030 objective, we will work with industry, including through the [Creative Industries Trade and Investment Board \(CITIB\)](#), to support creative businesses to access new markets and grow their presence around the world. The CITIB is an industry-led forum set up by the 2018 Sector Deal with industry-wide representation and expertise on exports and inward investment.⁷² With its new strategy published in 2022, the CITIB brings together insight and evidence from across the creative sector to advise and help coordinate steps taken by the government and industry to boost creative exports.

Headline Actions

- The government will triple funding for the [Music Export Growth Scheme \(MEGS\)](#) to £3.2 million over 2023-25. MEGS will provide grants to support touring which will enable emerging artists to break into new international markets.
- DBT will more than double the number of creative industries trade missions from four in 2022-23 to 10 in 2023-24. The programme includes trading partners such

as Australia, Japan, India and Mexico and a strong future creative economy focus including an esports mission to Saudi Arabia, and Createch missions to India and South by Southwest Sydney.

- The DBT Export Support Service (ESS), which now has global coverage, is helping creative exporters by providing guidance and direct support. The ESS has scope to look at specific issues affecting the creative industries such as ATA Carnets. The ESS will be expanded and will help creative exporters through guidance, direct support and by exploring solutions, including on areas most relevant to creative industries such as the temporary movement of creative professionals.
- The new [Creative Industries Faculty](#) of DBT's Export Academy, launched in September 2022, will deliver quarterly events and masterclasses to help businesses develop export strategies, including in more challenging markets such as in the Asia Pacific, India and the Gulf.⁷³
- DCMS will continue to support the screen sector to export their content through the three-year £21 million [UK Global Screen Fund](#).

In addition, we will:

Ensure that more creative businesses have the specialist resources and knowledge to access international markets.

- Innovate UK (IUK) and DBT will work with their regional advisor networks to support English regions participating in the [Create Growth Programme](#) to embed advice on exporting in their business support programme, and develop a referral process for participating businesses.

- DBT will encourage trade bodies and business partners to expand Exporter Accelerators, such as the export accelerator established for TV by [PACT](#).
- The government, supported by industry and the CITIB, will deliver and increase awareness of tailored support and resources.
- We will support foreign direct investment into the creative sector through the Export Development Guarantee, enabling future exporters to grow their business and seize global export opportunities.

Ensure the UK has beneficial trade terms and minimised market barriers for the creative industries in priority markets.

- We will continue to work together to ensure that the UK's trade policy reflects industry priorities and delivers access to priority markets. This includes business engagement, seeking to ensure that the interests of the creative industries are pursued in FTAs, including on IP, digital trade, audiovisual products and services, the movement of creative professionals and goods and mutual recognition



Ray Clarke, upholsterer.

- of professional qualifications. DBT is also looking to more closely align its activity with markets with which we are negotiating or have already negotiated free trade agreements, such as the Gulf, India and CPTPP member countries.
- DBT will ramp up work to [increase awareness](#) of the benefits of FTAs to creative SMEs and use bilateral government-to-government dialogues to further creative trade with priority markets.
- Industry, including through the CITIB, will help to maximise the sectors' exposure and success in priority markets.
- We will work together to help the sector adapt to the new relationship with the EU and its Member States, particularly touring musicians and performers.

Increase the profile of the UK's creative industries at overseas events and trade shows.

- We will ensure the UK creative industries have a significant presence at major creative global trade shows and events to showcase their creative excellence, such as

South by Southwest, Cannes Lions, Fashion Weeks, the Games Developers Conference, Kidscreen and Realscreen.

- DBT will put greater focus on supporting creative technology companies as the department develops its future creative economy strategy, with creative industries having a higher profile at key tech global conferences and events such as the Web Summit in Lisbon.
- Innovate UK is increasing the number of innovation missions, as part of the Creative Catalyst. This work will build on past successes such as the [LA Sync mission](#), the virtual production mission to the US and creative services missions to the Gulf.
- DBT will work closely with the sector to deliver targeted activity, including meetings with international buyers, potential co-production partners and investors.
- DBT will continue to support the [International Showcase Fund](#) (ISF).

“
Keep reinventing, looking outwards, being curious and don't get lazy.

Jenny Packham, British fashion designer

”



Case Study: The UK Global Screen Fund (UKGSF)

The UK Global Screen Fund was launched by DCMS in 2021 to grow the international reach and revenues of the UK's independent screen sector across film, TV, animation and video games. Following a successful £7 million pilot, DCMS invested a further £21 million over three years to support even more UK screen content to reach new audiences around the world.

The fund is aimed at boosting the global competitiveness of UK screen content and growing the international revenues, reach and partnerships of domestic independent businesses. It provides targeted funding for companies to develop and produce projects with international appeal, supports the worldwide distribution of UK content and encourages collaboration with international partners.

Over the pilot year, the British Film Institute (BFI), who administer the UK Global Screen Fund, made 75 awards across all funding strands. This included 34 International Distribution awards, 11 International Co-Production awards and 30 International Business Development awards. Projects supported so far include Good Luck to You, Leo Grande (starring Emma Thompson), Living (starring Bill Nighy) and The Miracle Club (starring Maggie Smith).

Productions backed by UKGSF also saw considerable success at film awards season, with three BAFTA nominations, including an award for Living and a shortlisting for Good Luck To You, Leo Grande, and Brian and Charles, and two Oscar nominations for Living.

UKGSF has funded companies based across the UK, and these funded companies also reported activities (shooting, production and post production) across the length and breadth of the UK.

Already, the results from the evaluation of the Pilot Year (2021-2022) have shown that the UKGSF pilot year has laid the groundwork for future benefits to the UK's screen sector and established a positive trajectory for the future success of the Fund, which has since been funded for an additional three years from 2022-2025.



Little Simz at the Mercury Awards 2022.

CHAPTER TWO: WORKFORCE

Goal Two: Build a highly-skilled, productive and inclusive workforce for the future, supporting one million more jobs across the UK

In 2030, we will have delivered on a creative careers promise. We will build a pipeline of talent into our creative industries, from primary school to post-16 education and those returning to the workforce. We want to generate more fruitful opportunities through an inspiring and fulfilling education. This is to ensure our creative workforce will meet the needs of industry and embody the diversity, dynamism and talent of the UK.⁷⁴ We will enable a new generation of highly-skilled workers to enter the creative workforce, as well as supporting the current generation to learn new skills and progress. We want to see the sector create even more new jobs, with creative careers providing high quality work across the UK.

Over the previous decade, the creative industries' workforce grew at almost five times the rate of the rest of the economy, and it has the potential to continue growing rapidly.⁷⁵ There are a huge range of roles in the creative industries and collectively they are the jobs of the future: more resistant to automation, highly-skilled and highly rewarding. The sector also has high levels of project-based working and reliance on freelancers, who make up over a quarter of the total creative industries workforce (about double the whole-economy average).⁷⁶ A skilled, inclusive and productive workforce is vital to ensuring creative businesses can adapt to changes, compete commercially and identify new areas to innovate and grow.

Sir Peter Bazalgette's 2017 [Independent Review of the Creative Industries](#) forecast

that in 2030 there would be one million extra jobs in the sector compared to 2016. By 2021 one third of these jobs had been created, with a total workforce of 2.3 million.⁷⁷ To build on this strong trend of employment growth and to reflect our heightened ambitions for the sector, we are re-setting the count so that from 2021 to 2030, we want to see one million additional jobs in the creative industries.

The conditions have to be right to generate these roles and fill them with the best talent. In the short-term, economic shocks could impact the resilience of the workforce. We witnessed this during the pandemic amongst creative freelancers in particular. Over the rest of the decade, changes in technology and innovation will continue to catalyse changes in the skills needs of the sector. The sector

“
I determined to do no less than to transform the world
with Beauty.

William Morris, British textile designer and artist

”

increasingly relies on a fusion of creative and STEM (science, technology, engineering and mathematics) skills that are often highly specialist, alongside commercial, practical and technical skills. The sector is already experiencing skills gaps and shortages, with almost half of creative employers reporting skills issues.⁷⁸ Specific skills requirements vary across creative sub-sectors and are constantly evolving and creative businesses expect this to continue into the future.⁷⁹

We want the best possible information on current and future skills needs, to help education and training providers at every level match their offer to industry demand. Meeting our ambitions to deliver this creative careers promise requires a holistic approach, with close working across government and the creative sectors to support those already working in the industry and those yet to join. We will address every stage of the talent pipeline and support people from all backgrounds, from school children to adults returning to the workforce. We will look

to nurture creative talent in primary and secondary education through to further and higher education and lifelong learning.

While Chapter One focuses on supporting businesses to innovate, attract investment and export, Chapter Two is focused on their workforce and has **three key objectives: education, skills and job quality.**

- On education, we need to provide equal access to the creative and cultural sectors and build a foundation of knowledge and pathways into the creative industries at every stage, from schools to further and higher education, to foster creative talent early on. This must be informed by industry and complemented by specialist careers information, advice and guidance, to ensure members of the future workforce are aware of the diverse range of roles and pathways into the creative industries.
- On skills, we will invest in the UK's creative workforce by ensuring that they can access the necessary vocational training and skills

at all stages of their career. We need to boost the provision and increase take-up of a range of technical education pathways and training opportunities for those entering and progressing through the sector. This provision will be dynamic, based on clear data and evidence to identify, anticipate and respond

quickly to the demands of creative businesses.

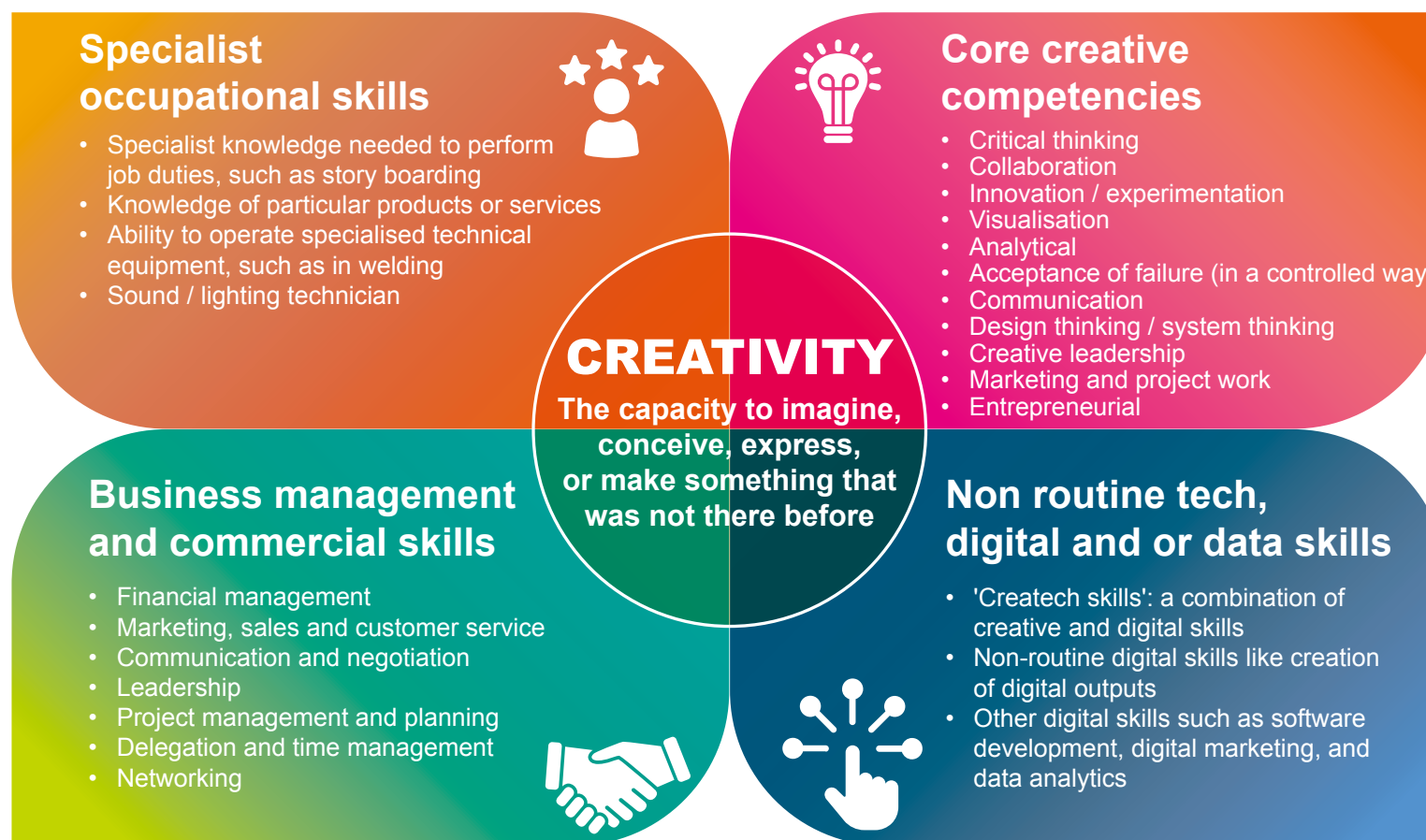
- On job quality, work in the creative industries will set a benchmark for what “good work” looks like. With the best management and workplace practices, as well as clear support for professional

development and progression, we can ensure everyone in the creative industries can thrive and the sector can meet its workforce requirements.

To deliver our objectives, joined-up government and industry engagement

is essential. This work will support the government’s wider ambitions set out in the [Skills for Jobs: Lifelong Learning for Opportunity and Growth White Paper](#), [Good Work: The Taylor Review of Modern Working Practices](#), the [UK Digital Strategy](#) and the [Levelling Up White Paper](#).

Skills for a creative career



Devolved Administrations' Workforce Policies

Scotland

The Scottish Government and agencies are prioritising creative skills and education through a number of national programmes. The [Creative Future Programme](#) is a partnership between XpoNorth and the University of the Highlands and Islands that brings together industry and students to support course development and provide young people with placements, mentoring and advice to make them work ready and to address future skills gaps. 90% of students said they felt the programme boosted their ability to work in the sector. Creative Scotland is also supporting freelancers with the [Illustrated Freelancers Guide](#). The guide provides practical resources to help freelancers understand their rights and how best to avoid and address difficult situations.

Wales

The Welsh Government is prioritising the creative workforce in its [Programme for Government](#), and launched a [Creative Skills Body and Action Plan](#) in 2022. The Welsh Government is supporting creative skills through its [apprenticeship](#) model tailored to the Welsh workforce, its [freelancers pledge](#), and its [annual fund](#), which will be supporting 17 projects with £1.5 million this year. Creative Wales is also supporting skills and job quality initiatives such as the [National Film and Television School in Wales](#), [Culture Connect Wales](#), [Beacons Cymru](#) and the [Well-being Facilitator roles](#). With regards to education, creativity is already on the curriculum in Wales and the Welsh Government is also adopting a cross-government approach to promote creative careers in the new Curriculum for Wales and new GCSE qualifications.

Northern Ireland

The Northern Ireland Executive is committed to supporting creative skills and is working with [Northern Ireland Screen](#), [Arts Council of Northern Ireland](#) and stakeholders to build pathways to creative careers and support digital upskilling. The Executive's 2022 [Covid Recovery Employment and Skills Initiative](#) has provided £9 million to support new entrant employment and training opportunities in the arts and creative industries. Northern Ireland Screen's integrated strategy prioritises creative education and skills development alongside industry investment and maximising cultural value, including support for unique Moving Image Arts GCSE and A-Level qualifications and industry-led careers programmes designed to address skills gaps. The Executive also supports dedicated [Creative Learning Centres](#) and other partners to make cultural and creative content widely available in schools and youth settings, targeting disadvantaged groups.



Creative Access event.

2030 Education Objective: A foundation of education and opportunities to foster creative talent from a young age

Providing a strong foundation of creative learning is a vital building block for children and young people because we need inspired, empowered and creative young people to drive these industries forward. Creative learning, from extra-curricular wraparound primary care to industry-led sixth forms, supports academic achievement, interpersonal skills and resilience – attributes increasingly in demand by employers. As the [Durham Commission on Creativity and Education](#) noted, fostering creativity at a young age is key – in the context of developing knowledge, skills and understanding – to driving growth not only in the creative industries but also in the wider economy, as demand for creative skills across other sectors increases.⁸⁰

Ensuring this foundation is freely available to all children and young people both in and out of school and through a range of subjects, activities and experiences, is key to unlocking the potential of the next generation of talent. Young people who opt not to stay in academic education can find satisfying and well-paid careers in the creative and cultural sectors, but they may require support to access those opportunities.

There are two key challenges impacting the talent pipeline. First, there are concerns in some sectors about the variation in the quality and availability of creative subjects at school.⁸¹ For example, between academic years 2009-10 and 2021-22, the proportion of pupils taking Design and Technology GCSEs fell from around 42% to 27% in all schools in England. This contrasts with the proportion of pupils taking Art and Design GCSE which increased from 27% to 29% over the same period.⁸² To ensure we have the right skills pipeline to meet future demand, we must understand the progression routes better, build on our successes and address potential gaps.

Second, young people and their carers can lack knowledge of – or have misunderstandings about – the kinds of jobs available in the sector. A recent careers report on the screen industries found that 19% of career advisors said they feel informed about the screen industries and 41% said they wished they knew more.⁸³ More widely, disparities in cultural engagement have a profound impact on the chances of individuals getting into creative occupations.⁸⁴

As arts and creative provision in schools can inspire young people to follow future careers in the sector and wider creative economy,

the government is committed to a high-quality, broad and balanced curriculum for all children and young people, as set out in its [Schools White Paper](#) (England only) in 2022. Over and above core funding for schools, the government will continue to invest around £115 million per annum revenue funding in cultural education in England to 2025 through music, arts and heritage programmes, including as part of the [National Plan for Music Education](#) (NPME) (2022).⁸⁵

Furthermore, our cultural arm's length bodies and National Lottery funding are creating educational opportunities for children and young people. This includes over £360 million annually over the past four years from ACE to support organisations that work with children and young people, around £20 million over three years on screen education and the Film Academy as set out in BFI's [National Lottery Funding Plan \(2023-26\)](#), and £115 million in Lottery [Community](#) and [Heritage](#) grants. In ACE's 2023-26 investment programme, around four-fifths (79%) of the national portfolio is delivering activity specifically for children and young people.

If we are to meet our aims, embedding industry experience into this foundational

learning is essential. Collaborations between the government, industry and educators are key for giving children and young people creative opportunities and fostering talent and skills. There are strong examples we can learn from here, such as:

- [NextGen Skills Academy](#)
- [Global Academy](#)
- [Theatre Workout Group](#)
- [The BRIT School](#)
- [East London Arts and Music](#)

The creative sector also relies heavily on those who choose to continue studying after leaving school. Over two thirds of the creative workforce have a Level 6 qualification or higher (69%), compared to 41% across the UK economy.⁸⁶ With a high level of 'matching' between graduates in creative subjects and creative jobs, our world-leading higher education system must continue to be well-supported and the critical value of creative degree courses and creative graduates appropriately recognised.⁸⁷

Actions and Ambitions

To achieve our 2030 Education Objective, we will support pathways into creative careers from a young age through: foundational



Product and furniture design students at Kingston School of Art.

creative opportunities, inspiring creative careers guidance and the opportunity to learn from industry and creative practitioners through in-school programmes, work experience or specialist institutions across further and higher education. We must not only ensure that talent is identified and nurtured from a young age, but also demonstrate to young people and their parents that creative careers are exciting, innovative and rewarding.

Headline actions

- The Department for Education (DfE) and DCMS will work with industry and cultural arm's length bodies to publish

a new [Cultural Education Plan](#) later this year, setting out a long-term approach to support cultural education and creativity in schools in England. This will tackle disparities in cultural engagement and support career pathways into the creative economy (including opportunities to engage with industry both in and out of school). The Expert Advisory Panel, led by Chair Baroness Bull, will inform the development of the plan.

- DfE, working with DCMS, is moving ahead with the NPME, which was published in June 2022. Implementation will include delivery of £25 million funding for musical instruments and a new Music

Progression Fund which will support up to 1000 disadvantaged pupils with musical potential. A newly completed Music Hub network will be in place by September 2024, with Arts Council England leading the competition this year. We hope the music sector will play its part in supporting Music Hubs that provide young people with the best opportunities in their area. Baroness Fleet will chair a new Monitoring Board to oversee implementation of the NPME, including a focus on strengthening the talent pipelines and help create the musicians, composers, music technicians and audiences of the future.

- DfE and DCMS will support pathways into creative careers from a young age. This will be achieved through foundational enrichment opportunities, inspiring creative careers guidance and the opportunity to learn from industry and creative practitioners through in-school programmes, work experience and the curation of specialist institutions across further and higher education. DfE and DCMS will work with industry to explore opportunities for providing enrichment activities as part of its wraparound care support for parents.
- DCMS and DfE will work together with industry to understand current levels of access to high-quality specialist arts, music and creative media provision for 14-19 year olds across England and explore options for enhancing access to existing and new providers.
- DCMS and industry partners will work together to deliver the £1 million second phase of the [Discover! Creative Careers Programme](#) in England. This will seek



Ilana Belsky, diamond cutter.

to improve awareness and challenge misconceptions about creative careers among young people, their parents and teachers – with a particular focus on underrepresented groups. We will learn from this programme and explore options for building on it in the future. We will also look to leaders in creative sub-sectors to champion and explain creative careers in our schools.

In addition, we will:

Ensure that young people can access high-quality creative education.

- We will work together to ensure the value of higher education creative courses is reflected in ongoing higher education reforms.

Inspire the next generation of talent to consider a career in the creative industries.

- We will work together to ensure the creative industries are embedded into other careers initiatives, such as the National Careers Service, Apprenticeship Support and Knowledge Programme and Careers and Enterprise Company – a key delivery partner for training careers advisors in schools as part of the Discover! Creative Careers Programme.

Support collaboration with industry which will continue to be a cornerstone of all education policy that supports the creative industries.

- The government and industry will work together ensuring the sector's expertise and hands-on experience is embedded

“
Design is the way we
endlessly invent to enhance
our experience of the world
around us.

Alison Brooks, British architect

”

as a priority in all relevant education programmes. Examples include: the Royal Shakespeare Company's [Associate Schools Programme](#), which connects primary and secondary state schools and local theatres across England; Saatchi & Saatchi's [Upriser](#) programme, which matches creative companies with secondary schools; and UK Music's [Music Academic Partnership](#) programme, which pairs higher education institutions with members of UK Music.

Case Study: Digital Schoolhouse

Digital Schoolhouse, in partnership with Nintendo UK, uses play-based learning to engage the next generation of pupils and teachers with the computing curriculum. Digital Schoolhouse is delivered by the UK games industry trade body Ukie and is backed by the video games industry and government. Sponsors include PlayStation, Electronic Arts, SEGA, Ubisoft and Outright Games.

Digital Schoolhouse's computing workshops are based at local primary schools and libraries across the UK and are delivered by its expert network of Schoolhouses and lead teachers. They combine a unique approach to play-based learning through innovative activities and free adaptable resources. Young people's levels of interest in video game and esports careers have tripled since Digital Schoolhouse started to explore esports as a tool to improve educational attainment. From 2021-2022, Digital Schoolhouse has reached over 50,770 students from more than 940 schools and 1465 teachers in the UK.⁸⁸

2030 Skills Objective: Stronger skills and careers pathways generate a workforce that meets the industry's skills needs

High-quality and employer-led skills provision is vital for our creative industries' growth, productivity and international competitiveness. Building on a strong foundation of creative education, young people need to start acquiring the specialist skills critical for creative roles. These skills must then be regularly updated, as labour market forecasts indicate creative jobs will remain highly-skilled, with fast-evolving skills needs.⁸⁹ As highlighted in the [Skills for Jobs: Lifelong Learning for Opportunity and Growth White Paper](#) (England only), ensuring people can access training throughout their lives – through a technical-based qualification in school, such as a T Level, or through upskilling to fill a specific role, for example through a Skills Bootcamp – is critical for satisfying this growth.

To help deliver a highly-skilled and productive creative workforce, we first need better data and evidence on the occupations and skills that are, and will be, in greatest demand. Transferable skills in digital, problem-solving and communication are increasingly important across the creative industries, but different sub-sectors also demand highly specialist occupational skills.⁹⁰ For example, the digital skills and programming knowledge required of a visual effects (VFX) programmer in video games, or the technical skills necessary to be a sound engineer or stage technician, will be very different to those skills required of a set designer or advertising creative.

The PEC has helped improve the data and evidence here, but there is a need to do more. The [British Film Institute \(BFI\) 2022 Film and High-End TV Skills Review](#) is a recent example of how this issue can be approached at a sub-sectoral level. As well as developing

this sector's evidence base, the BFI has committed £9 million investment of National Lottery funding (as set out in BFI's [National Lottery Funding Plan \(2023-26\)](#)) to create 'Skills Clusters' to support skills development and training at a local level across the UK, as recommended by the Review. It has also helped to elicit greater industry collaboration around training and workforce development, convening a new industry-led Skills Task Force to respond to the Review which will produce and support the delivery of a plan of action to address the skills shortages, gaps and related workforce challenges in the sector over the next five years.

As well as identifying skills demands, we also need to address skills supply. To meet future demand we must better understand the range of progression routes available and

ensure they work specifically for the creative industries. Apprenticeships, T-Levels and Higher Technical Qualifications all present an opportunity to deliver a workforce with hands-on experience.

Working with DCMS and industry, DfE has introduced new flexibilities in apprenticeships. This includes enabling large employers to transfer up to 25% of their levy funds to smaller businesses, as demonstrated by Amazon investing £8 million in a dedicated [Apprenticeship Levy Transfer Fund](#), £1 million of which was specific to creative industries. We are also delivering the 2021 £5 million Flexi-Job Apprenticeship Fund pilot (England only) and changed legislation in 2022 to enable portable apprenticeships. Creative industries employers such as the BBC, Netflix, ScreenSkills and Sky have all taken part in



Primary school children participating in filmmaking.

these schemes.⁹¹ There is more work to be done to apply the learnings from these pilots to better align apprenticeships with the working practices of the creative industries.

With 80% of the 2030 workforce already in employment,⁹² opportunities to retrain and upskill are critical for keeping pace with the changing demands of industry.⁹³ DfE's 2025 [Lifelong Loan Entitlement](#) (England only) will provide individuals with access to a loan, equivalent to four years of post-18 education, at any stage of their life, while 16-week Skills Bootcamps in England provide a fast-paced, targeted route for workers to retrain and fill live vacancies.

Immigration also has an important role to play in addressing skills challenges in the short term. The UK remains a world-leading hub for highly-skilled international creative talent, with 15% of the creative workforce in 2021 being non-UK nationals, compared to 11% in the economy as a whole.⁹⁴

The Department for Work and Pensions (DWP) services provide another route into the creative workforce. DWP's Kickstart Scheme (England, Scotland and Wales) subsidised employers during the pandemic to employ 16-24 year olds on Universal Credit and saw huge interest from creative job seekers and employers. As of January 2022, 10% of Kickstart jobs started and 9% of jobs advertised were in creative and media organisations.⁹⁵

Actions and Ambitions

To achieve our 2030 Skills Objective, we will further strengthen high-quality technical education pathways and ensure that jobseekers and immigration systems are better utilised by industry to help meet our current and future workforce needs.

Headline Actions:

- DfE and DCMS will work with industry to better understand the opportunities and challenges facing creative apprenticeships. This work – including through ministerial roundtables – will improve engagement with small businesses, the quality of specialist training provision, the relevance of standards for creative apprenticeships and the effectiveness and sustainability of the Flexi Job model.
- The government will work with the creative industries nationally and locally to ensure they are well placed to take advantage of future procurement opportunities for Skills Bootcamps in England. These provide a fast-paced,

targeted route for adults to retrain and upskill and employers to fill live vacancies at intermediate skill level through courses lasting up to 16 weeks.

- DfE and the Institute for Apprenticeships and Technical Education (IfATE) will work with industry, specialist educators and employers to input into the Post-16 Level 3 and below qualifications review to ensure that – where technical and academic qualifications in the creative sector are necessary alongside T-Levels and A-Levels – they meet the principles of being high-quality, employer-led with a focus on good progression outcomes.
- The [Skills for Jobs White Paper](#) (England only) announced the development in

2023 of 38 employer-led Local Skills Improvement Plans (LSIPs) to identify the priority changes needed to reshape technical skills provision to better meet the needs of employers and the wider economy. LSIPs, which have statutory underpinning, will be accompanied by £165 million of funding (until March 2025) to help colleges and other providers respond to the priorities identified in LSIPs including in the creative sector.

- DCMS will continue to engage with industry to act on the findings and recommendations from the [BFI's Film and High-End TV Skills Review](#), and the subsequent actions to be defined by the Screen Sector Skills Task Force, which will



XR Stories with Northern Ballet.

“
We’re the Heineken sector, reaching parts other
sectors can’t.

Sir Peter Bazalgette, British Creative Industries leader

”

include an agreed approach to ensuring an ambitious financial commitment is made by the industry towards training the existing and future workforce.

In addition, we will:

Tailor lifelong skills provision to meet creative industries' needs.

- DfE will support industry to ensure the two new creative T Levels rolling out in 2024, including the placement element, are high quality and responsive to demand.

Improve industry engagement with alternative pathways into the workforce.

- As we develop skilled talent across the UK, the Home Office, DCMS and industry will work together to maximise the effectiveness of existing [immigration routes](#) for the creative industries workforce, including freelancers and consider creative industries in future immigration reforms. This includes improving industry's understanding of, and engagement with, the full suite of [inward mobility routes](#) the UK offers.⁹⁶

- DWP, DCMS and industry will work together to boost opportunities for utilising employment programmes to progress people at risk of unemployment into creative roles.

Use the latest data to understand skills gaps and shortages in the creative industries and develop new datasets to provide consistent and comprehensive evidence.

- The government – including the [Unit for Future Skills](#) – will work to improve the availability of official data on the creative industries to inform actions and interventions through to 2030. Together with industry, the government will develop a labour market framework for understanding and tracking changing skills across the creative industries. This will draw on assessments of current and future skills needs for each creative sub-sector, undertaken within the next 12 months and coordinated by the CIC. This follows the example of the BFI's [Film and High-End TV Skills Review](#) and the Design Council's [Design Economy](#) research.

Case Study: Boomsatsuma

Boomsatsuma, an education SME in Bristol, has identified opportunities to build on traditional models of education to better support creative employers. With a portfolio of ten flexible further and higher education-level courses, Boomsatsuma aligns its offer with skills shortages faced by creative businesses across South West England, including rapidly growing Createch businesses in the region that are utilising digital and tech. Young people are nurtured through a system that guides them from school to college to a degree and into employment. It particularly suits young people from disadvantaged backgrounds who do not want to go down the conventional university route.

Boomsatsuma strives to embed learning 'where the work is': at Bottleyard Drama Studios (the biggest producer of TV drama in the south west), Tobacco Factory (home to a theatre and tech SMEs), Ashton Gate Stadium (home to Bristol City's sports media and communications team), Engine Shed (centre of tech innovation) and Pytch (the south west leader in virtual, XR and live event production).



Storytrails at Brixton Library.

2030 Job Quality Objective: All parts of the creative industries are recognised for offering high quality jobs, ensuring a resilient and productive workforce that reflects the whole of the UK

The government-commissioned 2017 [Taylor Review of Modern Working Practices](#) advocates that "all work in the UK economy should be fair and decent with realistic scope for development and fulfilment." Jobs in the creative industries can be very rewarding, with high rates of job satisfaction and above average wages.⁹⁷ The often freelance and project-based model has also ensured creative industries can operate dynamically and rapidly adapt to changing circumstances.⁹⁸ It can give workers more flexibility and control – 72% of workers in the creative industries claimed autonomy over their hours, relative to a 52% average across the economy.⁹⁹

But if the freelance, project-based nature of much creative work has many advantages, research and evidence from the PEC and others highlights that it also comes with challenges in some parts of the sector. These can include informal recruitment practices, unpaid overtime and an absence of HR-type support (including non-pecuniary benefits, formal training and ongoing professional development).¹⁰⁰ The research demonstrates that there are many such trade-offs between being PAYE and self-employed which can disproportionately impact those from under-represented backgrounds. It is also concerning that allegations of bullying, harassment and discrimination have been made in creative sub-sectors, particularly from freelancers.¹⁰¹

In practice, many creative endeavours rely on the close collaboration between the freelance creative workforce and established



Studio 1, AIR Studios.

businesses. It is the combination of a creator's individuality and the knowhow of an experienced business (e.g. a publisher, film studio, or label) that is behind much of the best UK creative content, be it a new film, album, or book. However, this market structure can also generate some challenges.

For example, as part of the 2021 DCMS Select Committee inquiry into music streaming, concerns were raised about some musicians' ability to earn a living from music streaming and, in particular, about their relationship, as individual creators, with the labels, publishers and streaming platforms that support and promote their work. DCMS, in collaboration with the IPO, CMA, and the Centre for Data Ethics and Innovation, launched a programme of work to investigate the issues raised in this streaming inquiry. This will conclude in 2023.

While this programme of work has identified increasing transparency of royalty information and improving data flows as important, freelance creators in other sub-sectors may also face challenges. Whether these are sector-specific or more cross-cutting, we need to ensure that the freelance nature of many creative endeavours supports individuals accessing, progressing and remaining in the workforce and increases their productivity.

Enhancing job quality and promoting fair work is a cross-economy priority. The government's [Good Work Plan](#) has fair and decent work as an overarching ambition and the [Equality Hub](#) has committed to develop resources to advance fairness in the workplace, which will be available to employers this year. His Majesty's Revenue and Customs (HMRC) has played its part, sharing guidance with employers in the creative industries in 2021

on the illegal nature of unpaid internships and the minimum wage laws.

Within the creative industries, Creative and Cultural Skills published their best practice guide on [Working with the Self-Employed](#) in 2019 and in 2023 social enterprise [Creative Access](#) delivered a mentoring project for freelance creatives following research which indicated half of freelancers are not being sufficiently supported with their professional development.¹⁰² In 2021, in response to a DCMS commission, Creative UK convened a bullying, harassment and discrimination working group and roundtables with attendees from across the creative industries to develop codes of conduct, training and standards.

The government and industry also recognise the importance of ensuring all people, wherever they are, and whatever their background, have the opportunity to realise their potential. This is essential to developing the wealth of ideas and broad talent pipeline that the sector needs. Sector-led initiatives such as the Creative Diversity Network's [Diamond](#) project and Amazon and other's [TV Access Project](#), Screen Yorkshire's [Beyond Brontes](#), the [Backstage Niche](#) network and Ukie's [#RaiseTheGame](#) pledge are seeking to do just that. Following the adoption of its Diversity Charter in 2019, the CIC has commissioned an online cross-industry Charting Progress tool, due to launch in 2023. This will enable creative businesses to track the effectiveness of diversity and inclusion interventions across the sector and share best practice.

Actions and Ambitions

To achieve our 2030 Job Quality Objective, industry and government will tackle these issues, while preserving the dynamism of the sector.

By ensuring all work in the creative industries is good work, we will improve the ability of people from all backgrounds to join and stay in the creative workforce, increasing productivity by investing in the talent that drives it.

Headline Actions:

- The PEC delivered its [Independent Review of Job Quality and Working Practices in the Creative Industries](#), part-funded by DCMS, in 2023. The findings vary across the four UK nations, but the Review has identified four strategic priorities: strengthening the baseline of protection for creative workers, driving improvements in management capability, enhancing professional development amongst the workforce and improving worker representation. The government and industry will set out an action plan to address the recommendations later in the year.
- The CIC has commissioned an online, cross-industry Charting Progress tool, due to launch in 2023. This will enable creative businesses to track the effectiveness of diversity and inclusion interventions across the sector and share best practice.
- To promote fair treatment, Creative UK is leading discussions with industry to address bullying, harassment and discrimination (BHD). The Creative Industries Independent Standards Authority is being established by the industry to address BHD and provide trusted support and advice, particularly tailored to meet the needs of freelancers. The government welcomes industry's work in this area and continues to push for rapid progress.

In addition, we will:

Ensure there are fair working practices and

opportunities for all creative workers across the sub-sectors.

- The IPO and DCMS have published a UK industry agreement on music streaming metadata. This marks a significant milestone in the government's programme of work on music streaming, paving the way for greater accuracy and efficiency in the distribution of music data.
- Further progress has been achieved through industry action to benefit artists and creators, including the decision by many labels to disregard pre-2000 unrecouped advances.
- The Government will establish a working group to explore and consider industry-led actions on remuneration for existing and future creators, acknowledging recent progress by music companies in this space.

Enhance support networks and resources for creative freelancers.

- Creative UK is leading – in partnership with many others – a Redesigning Freelancing initiative to support the development of fair and equitable engagement with freelancers, the first phase of which is being supported by the English Combined Authorities. This work will build on industry best practice such as Sony Music's [Artists Forward](#) and the Musicians' Union's [Contract Advisory Service](#).

Ensure fair treatment for all creative workers.

- Industry will deliver initiatives such as a new code of conduct designed by [Black Lives in Music](#) to eliminate racism in the music industry, which will be adopted in 2023. The British Fashion Council is creating an



Academy of Live Technology student's pyrotechnics.

industry-standard Diversity and Inclusion Benchmark for the global fashion industry alongside practical advice and toolkits to help organisations change and measure their successes.

Ensure there are fair working practices and opportunities for all creative workers across the sub-sectors.

- The IPO and DCMS have published a UK industry agreement on music streaming metadata. This marks a significant milestone in the government's programme

of work on music streaming, paving the way for greater accuracy and efficiency in the distribution of music data.

- Further progress has been achieved through industry action to benefit artists and creators, including the decision by many labels to disregard pre-2000 unrecouped advances.
- The Government is establishing a working group to explore further issues around creator remuneration.

Case study: Southbank Centre – Skills development: Reframe

The Southbank Centre and Apple recently announced the 80 artists selected to join its first 'The Residency' programme, a pioneering talent development initiative supporting the next generation of black and black mixed heritage creatives in London, Manchester and Birmingham.

The project will include support from leading black creative mentors, inspiring artists and industry professionals, and will allow participants to produce new work with Apple technology whilst also receiving guidance about finding future work opportunities in the arts. The creatives will all showcase their work from the programme this summer at the Southbank Centre.

This project is part of Reframe which is supported by Apple and produced by the Southbank Centre with Factory International in Manchester, Birmingham City University's STEAMhouse and Midlands Arts Centre in Birmingham. It is supported by Apple through their US Racial, Equity and Justice fund. The Southbank Centre is the only organisation in Europe chosen for this fund.



Artists and tutors welcomed to the Southbank Centre for the talent development programme REFRAME: The Residency.

CHAPTER THREE: WIDER IMPACT

Goal Three: Maximise the positive impact of the creative industries on individuals and communities, the environment and the UK's global standing

In 2030, we want the creative industries to continue to increase their powerfully positive impact on the world around them. The creative industries can help address health and wellbeing challenges and foster pride in place, which contributes to community cohesion and local regeneration. The creative industries are also perfectly placed to help drive the transition to net zero and a sustainable economy. Finally, we should continue to leverage the creative industries' soft power to drive international growth and positively shape the UK's global reputation.

The creative industries' contribution to the UK stretches far beyond the direct economic contribution outlined in Chapters One and Two. Creative works, from groundbreaking advertising campaigns to original film and TV content and compelling podcasts, can shape our ideas and actions and how we understand ourselves and each other.

Creative activities such as playing the guitar, making pottery or reading a book positively impact how we live and enjoy our lives. Creative venues and spaces enhance wellbeing by bringing people together and making high streets more vibrant.¹⁰³ This social value is also now recognised in HMT's [Green Book](#) for assessing business cases.

Internationally, the sector's output enhances the UK's soft power. British talent and imagination is known globally thanks to films from Christopher Nolan, internationally

touring theatre productions from Nica Burns, songs from Harry Styles and Stormzy, the work of designers such as Jenny Packham and Thomas Heatherwick, institutions such as the BBC and a library of literature stretching back centuries. The visibility of our creative industries strengthens our standing on the global stage and helps other sectors achieve their export ambitions by projecting the UK as a source of ideas and innovation around the world.

In this chapter, we focus on **three key objectives** where the sector has a strong track record and demonstrable potential to make an even bigger impact in the future: **health and wellbeing, environment and soft power**.

- The creative industries have a proven link with health and wellbeing. We want all individuals and communities to be able to consume creative content and participate in creative activities, in physical spaces

and online. We also want to strengthen the evidence base to inform stronger direct links between the creative industries and the health service. In this way we can increase the impact of the sector on our mental and physical health. In short, we can help people live healthier, more productive lives.

- The creative industries can play a critical role in achieving climate goals. By enabling thousands of creative micro-businesses to measure and minimise their own environmental impact, driving sustainable innovation, skills development

and developing the right supporting infrastructure, we can accelerate the transition to net zero. The creative industries are also a means of communicating climate science and the impact and opportunities to mitigate climate change.

- Finally, the sector can also strengthen the UK's soft power and global reach. By showcasing our world-leading creativity, supporting exports and strengthening the sector's global relationships, we can build new audiences and strengthen the UK's global reputation.



Stormzy at the BRIT Awards 2023.

Adult participation in creative industries activities in the last 12 months



Source: DCMS Participation Survey England, July to September 2022

Devolved Administrations' Wider Impact Policies

Scotland

The Scottish Government and agencies have a range of interventions to unlock the wider impacts of the creative industries. [Creative Placemaking](#) is a pioneering methodology that uses creativity to support community-led change and is being successfully applied through a network of towns across the South of Scotland. The network is supporting the growth of local creative hubs, and in Dumfries has led to the founding of a community benefit society, which is bringing a section of the high street into community ownership. The Scottish Government and Creative Scotland's 2020 [Culture Collective Fund](#) has also distributed over £10 million to date to community-based projects such as [What We Do Now](#). Furthermore, the Scottish Government is supporting environmental sustainability through Culture Collective initiatives such as [CULTIVATE](#), which brings together creative practitioners and community groups to explore climate justice in a practical and meaningful way.

Wales

The Welsh Government is supporting the wider impacts of the creative industries through its [Programme for Government](#), [Well-being of Future Generations Act](#) and

strategic priorities on inclusive, sustainable growth and promoting the Welsh language. Their [Screen New Deal: Transformation Plan](#) – in collaboration with BAFTA, BFI, [albert](#), [Clwstwr](#) and [Film Cymru Wales](#) – aims to find a practical way forward to reach a zero-carbon, zero-waste future for Welsh film production. Creative Wales also asks applicants for production funding to sign an [Economic Contract](#) that includes commitments on low carbon targets and climate resilience, as well as fair work, promotion of wellbeing and adaptability. On soft power, the Welsh Government is amplifying the Wales national brand alongside the GREAT campaign.

Northern Ireland

The Northern Ireland Executive is supporting the wider impacts of the sector through the development of a new [Culture, Arts and Heritage Strategy](#), which aims to maximise cultural value for communities, build skills and set out priorities for investment in the future of the sector. The Executive aims to use creativity to help tackle social exclusion and inequality, to increase awareness of social issues and to improve opportunity. Programmes such as the Arts Council of Northern Ireland's [Arts and Older People programme](#) and [Northern Ireland Screen's Digital Film Archive](#) are targeting isolated groups, such as older people and those with dementia, to support them through creative activities. Moreover, festivals such as [Belfast International Arts Festival](#) and [Foyle Film Festival](#) are increasing community cohesion and cultural understanding. Northern Ireland Screen's strategy '[Stories, Skills and Sustainability](#)' places a focus on reducing the environmental impact of the screen industry. Sustainability has been introduced as a key consideration when supporting projects. For example the development of Studio Ulster and Northern Ireland Screen's prioritising of Virtual Production is predicated on the carbon reducing benefits of utilising Virtual Production. Furthermore a pilot scheme using Hydrotreated Vegetable Oil in place of diesel is also being delivered at film studio facilities to reduce carbon emissions.

2030 Wellbeing Objective: Creative activities contribute to improved wellbeing, help to strengthen local communities, and promote pride in place

The creative industries positively impact wellbeing in a number of ways. Individuals and communities, whether participating or consuming, can benefit from the imagination and impact of our creative industries. Participating in the creative industries can have a direct impact on wellbeing. For example, research shows that creative activities such as playing music and making arts and crafts can help people manage health issues from Parkinson's disease to dementia.¹⁰⁴ Engaging in creative activities can also underpin good mental health and this is increasingly used across our healthcare system with social prescribing initiatives – an approach that links people with activities provided by the voluntary, community and social enterprise sector. Activities range from music therapy, through charities such as [Music for Dementia](#) and the [Music and Mental Health Programme](#), to immersive treatments through OxfordVR. The Southbank Centre relaunched their '[Mix and Move](#)' initiative to find ways of increasing access to free, enriching social encounters through hosting social dances. Over the course of the pandemic, these virtual social dances were supported by judges and dancers from Strictly Come Dancing and helped thousands of socially-isolated people across the UK.

In England, funded by the [National Academy of Social Prescribing](#) and ACE, the [Thriving Communities Fund](#) has supported projects that use participation in creativity and the arts to enhance community collaboration and strengthen the range of social prescribing



The London Book Fair 2023.

activities offered locally.¹⁰⁵ It also funded the Southbank Centre's [Art by Post](#) programme which was launched in May 2020 to provide free creative activities through the letterbox to people across the UK at risk of social isolation, loneliness and digital exclusion. The activity packs, created by 17 professional artists, reached a community of 4,500 people, aged between 18 and 103. There are further opportunities for the sector to generate a greater impact and better evidence, and plans like the [Power of Music](#) will help unlock this.

The creative industries, and in particular our public service broadcasters (PSBs), as well as local TV, radio and press, play an important role in strengthening community cohesion and wellbeing and enhancing local democracy by providing content that reflects diverse communities.¹⁰⁶ They provide trusted news and information at local and national level that informs and encourages debate, which is enshrined in the PSBs' remits and in Ofcom regulation.¹⁰⁷ The [BBC Charter](#) requires the BBC to provide impartial, high-quality and distinctive output and services that help

people to understand and engage with the world around them, support learning for people of all ages, and reflect, represent and serve diverse communities. At the 2012 Paralympics, 83% of viewers agreed that Channel 4's coverage improved society's attitudes towards people with a disability.¹⁰⁸ And while attending to the interests and cultures of our diverse communities and groups, the output of PSBs also reminds us of the shared values that unite us.

Creative venues and the work of cultural and creative organisations play an important role in bringing content to local communities and making places more attractive to live, work and visit.¹⁰⁹ Local cinemas, music venues, theatres, museums and galleries bring people together in communal spaces to enjoy creative content, while also drawing people into towns and city centres and strengthening our social fabric. Moreover, institutions like the BFI's [National Archive](#) play an important role in safeguarding material of social and historical significance, working to preserve our cultural identity and making these valuable collections accessible to the public and for study.

Grassroots music venues are not only pillars of local communities and centres of research and development for the UK's world leading music industry, but often provide additional social and educational functions such as cultural projects, community work and educational courses.¹¹⁰ Government funding is supporting the creation and regeneration of local venues. Round 3 of the Cultural Development Fund saw [Morecambe Winter Gardens](#) awarded £2.7 million to regenerate a Grade II listed site to create a 1,000-2,500 capacity venue to support local and national artists.¹¹¹ The

project will transform the central promenade adjacent to the upcoming Eden Project Morecambe and will see the Winter Gardens, closed since 1977, redeveloped.

This is all in addition to the government's support for grassroots music venues during the coronavirus pandemic. As part of the unprecedented Culture Recovery Fund, the government provided more than £1 million for the Emergency Grassroots Music Venues Fund to ensure these valued cultural organisations were supported during the pandemic. Additionally, ACE have contributed £500,000 of public funding towards Music Venue Trust's community project to purchase at-risk grassroots music venues and rent them back to the owners as benevolent landlords.¹¹²

It is important that our creative industries are able to reach as many people as possible, particularly in the context of the health and wellbeing impacts of the pandemic and potential consequences of the challenges with the cost of living. The pandemic posed a threat to the financial resilience of many creative organisations,¹¹³ and the challenges with the costs of living could further reduce affordability and access.¹¹⁴ Securing and enhancing the infrastructure of local creative industries, particularly in deprived parts of the country where cultural engagement is often lower, will support wellbeing as well as economic regeneration in these areas.¹¹⁵

The pandemic has transformed consumption. We witnessed an explosion in the online offering of creative content with audiences watching plays from their laptops or picking up video game controllers for the first time to play online with friends and family.¹¹⁶ New technology presents an opportunity to reach

new audiences and create hybrid events that are inclusive and provide access for those who may not be able to attend in person.

Actions and Ambitions

To achieve our 2030 objective, we need to support the sector's financial resilience and help it capitalise on new technologies to drive economic regeneration and support wellbeing across the UK.

Headline actions

- The Music Venue Trust's £3.5 million [Own Our Venues](#) pilot is purchasing the

freeholds of grassroots music venues to bring them into community ownership and support their resilience. This will complement the additional £5 million of funding for ACE's Grassroots Music Venues Fund, described in Chapter 1, and help put our venues on a stronger path toward financial sustainability.

- ACE has increased funding outside of London to support greater opportunities in all parts of England. For example, in the 2023-26 investment programme, ACE is funding organisations in 78 "Levelling

Up for Culture Places" – areas with with historically low cultural investment and engagement – providing £43.5 million, representing an increase of 95%.

- DCMS will support our system of PSBs, including the introduction of a new proportionate and flexible online prominence regime to ensure public service content is available and easy to find on designated TV platforms and devices, as set out in the Broadcasting White Paper, [Up Next](#). This will be delivered through the upcoming Media Bill.



Wolf Alice at the Sugarmill.

- We will work together on UK Music and Music for Dementia's [Power of Music](#) recommendations and explore opportunities in other sub-sectors to support health and wellbeing.
- The refreshed CIC will provide a forum for the exchange of best practice and ideas on the impact of the creative industries on health and wellbeing.

In addition, we will:

Enhance direct links between the creative industries and the health service to support more participation.

- Innovate UK is investing up to £4 million in innovative projects in the immersive technologies to provide mental healthcare services via Strand Two of the Mindset Extended Reality (XR) for Digital Mental Health competition.
- The Department for Health and Social Care, through its recent funding announcement, is supporting the [National Academy of Social Prescribing](#) to contribute to the delivery of creative and art-based initiatives to communities in England.
- We will work with the PEC to strengthen our evidence in this area, and AHRC is implementing the £26 million [Mobilising Community Assets to Tackle Health Inequalities](#) programme to deliver research projects on the use of local, cultural assets and activities to support improvements in health inequalities in the UK.



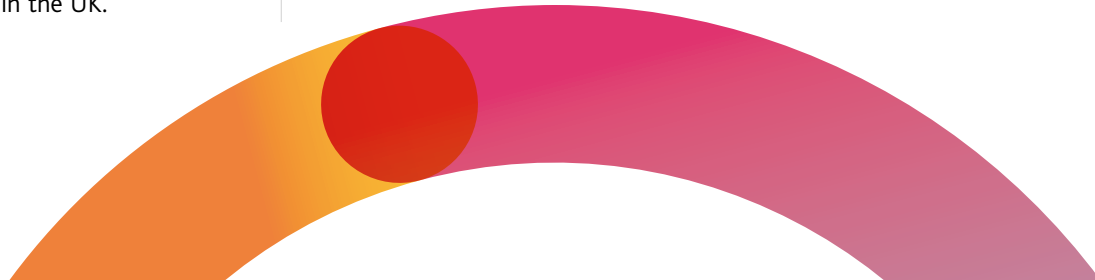
ABBA Voyage.

Ensure that all people and communities across the UK have the opportunity to consume creative works via creative venues and institutions.

- The government is working with industry to support creative venues' resilience through the [Energy Bills Discount Scheme](#) and DLUHC's £150 million [Community Ownership Fund](#).

- ACE's [Cultural Investment Fund](#) (England only) totals more than £200 million and supports museums, cultural venues and public libraries across England. It is designed to protect and improve people's access to culture, regenerate communities, upgrade buildings and digital infrastructure and use investment to promote economic growth.

- The BFI's £27.6 million Audiences programmes, as set out in BFI's [National Lottery Funding Plan \(2023-26\)](#), will also increase access and engagement with audiences across the UK.
- DLUHC's £4.8 billion [Levelling Up Fund](#) and the £2.6 billion [UK Shared Prosperity Fund](#) are supporting existing and new local infrastructure, including in the creative and cultural industries.
- We will strengthen our evidence on the creative industries' impact in local communities, including through the continued delivery of DCMS's [Culture and Heritage Capital Framework](#), AHRC's £1.5 million [Creative Communities Programme](#) and funding for the [Centre for Cultural Value](#).



Ensure that audiences have greater access to creative content online that supports their wellbeing, in particular public service content.

- We will ensure consumers, particularly the most vulnerable, are protected from harm when they access creative content online. For example, DCMS and the video games industry are working together to strengthen consumer protections around loot boxes, in particular for children. We

are also enabling better evidence on the impacts, positive and negative, of video games more broadly through the recently published [Video Game Research Framework](#).

- The government is working with industry to protect consumers against harmful content accessed online through initiatives such as the Online Advertising Programme, Online Safety Bill and video-on-demand regulation through the upcoming Media Bill.

Case Study: Liverpool Philharmonic’s Music and Mental Health Programme

Since 2008, Royal Liverpool Philharmonic and Mersey Care NHS Foundation Trust have been working in partnership to deliver a music and mental health programme throughout Liverpool City Region. In recent years, additional NHS partners have joined the programme, including the Clatterbridge Cancer Centre NHS Foundation Trust. The programme supports the wellbeing and recovery of people living with mental health needs, their carers and their families through music.

To achieve this, Liverpool Philharmonic musicians have been working alongside NHS staff in a variety of settings including inpatient units, secure services, brain injury rehabilitation units and in older people and dementia care homes to deliver music-focused sessions and activities. Activities include composing and songwriting, music courses, group performances accompanied by Royal Liverpool Philharmonic Orchestra musicians and dementia-friendly concerts at Liverpool Philharmonic Hall. Liverpool Philharmonic and its NHS partners hope to enhance the lives of its participants, helping to develop confidence, reduce isolation and build future skills.

In the first 14 years of the programme, more than 14,000 service users and their families have benefitted. The programme’s goal is to reach 20,000 service users by 2023, which they hope to achieve through expanding existing activities, social prescribing activities at Liverpool Philharmonic Hall, and launching new partnerships with NHS and social care providers.

2030 Environment Objective: Creative industries play a growing role in tackling environmental challenges, helping the UK reach the targets set out in the Powering Up Britain plan

Delivering a sustainable future is a key priority for the government, as set out in the [Powering Up Britain plans](#). The creative industries have a vital role to play in reducing UK carbon emissions and preserving natural resources. The shift to net zero also brings significant economic opportunities to create new jobs and grow businesses.

The creative industries, like all parts of the economy, need to address their own emissions and environmental impact. The issues are complex, differ across sub-sectors and often involve complex global supply chains. Film and TV emissions, for example, remain far above 1990 levels with a typical £50 million feature film production emitting 2,840 tonnes of CO2.¹¹⁷ It is estimated that the entire global fashion product life cycle is responsible for up to 8-10% of total global greenhouse gas emissions.¹¹⁸ In the UK, we purchase on average 26.7 kilograms of new clothing annually per person, higher than other high-income countries like France, Sweden and Italy, and textiles made with plastic fibres can remain in landfill for hundreds of years.¹¹⁹ Moreover, making just 100 UK theatres fully sustainable could save 6,500 tonnes of CO2 per year, the equivalent of 9,700 return economy flights to New York.¹²⁰

Positive steps are being taken across the creative industries, and the UK hosting COP26 has helped to galvanise a number of industry initiatives. The Design Council’s [Design for Planet](#) initiative brings together designers to support skills and knowledge sharing.

[Julie’s Bicycle](#) and the Vision 2025 network are launching the [Green Events Code](#), which will provide clear and workable minimum environmental standards and targets for all UK outdoor events and festivals.

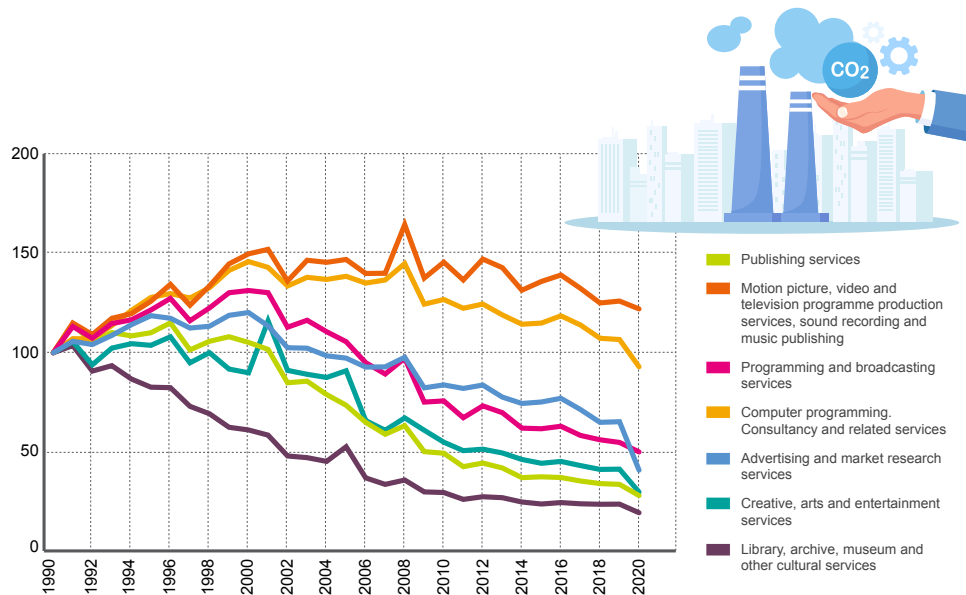
Similarly, the Theatres Trust and Julie’s Bicycle, in partnership with theatre-makers and other sustainability experts, have produced the [Theatre Green Book](#) as a common standard for making theatre sustainably. UK video games bodies and companies are also members of the UN’s [Playing for Planet Alliance](#), which is supporting climate action in the video games sector. As part of the Alliance, the [Green Game Jam](#) works with studios to explore integrating environmental themes into games that reach over one billion video game players worldwide.¹²¹

The Department for Energy Security and Net Zero (DESNZ) is supporting businesses through the multiple initiatives announced in its Powering Up Britain Plans, including



Lancaster Castle, designed by architects BDP.

UK emissions in the creative industries



Source: BEIS Final UK greenhouse gas emissions national statistics: 1990 to 2019

a previously committed £1 billion [Net Zero Innovation Portfolio](#) to accelerate the commercialisation of low-carbon technologies, systems and business models. The [Waste and Resources Action Programme](#), with support from the Department for Environment, Food and Rural Affairs (Defra), will support industry-led change in the fashion and textiles sector through [Textiles 2030](#) for England.¹²²

We are also witnessing innovation in sub-sectors such as music, crafts, architecture, fashion and publishing to meet consumer demand for sustainable products and practices, demonstrating the commercial potential for creative businesses.¹²³ Designers can influence the overall environmental impact of a finished product before it

reaches the consumer, including designing out waste, using innovative low-impact materials, designing for repair and reuse, and designing for sustainable behaviour change. For example, fashion firms are developing products using new materials such as mushroom-based fabrics.¹²⁴ Similarly, through sustainable and regenerative design, architects are playing a vital role in reducing emissions and enhancing biodiversity in our built environment.

There are opportunities to accelerate the sector's adaptation, innovation and impact. Backing sustainable practices in the sector by encouraging R&D, supporting improved measurement, sharing best practice and boosting skills in climate literacy as well

as sub-sector sustainability practices, can generate jobs and drive green growth.

Actions and Ambitions

To achieve our 2030 objective, we need to work together to reduce the creative industries' direct impact on the environment, improve the infrastructure to support net zero transitions and seize the growth opportunity that improved sustainability can provide.

Headline actions

- The CIC will lead the development of a Creative Climate Charter, unifying the sector around shared goals and principles to drive further action in reducing climate impacts.
- DESNZ, supported by DCMS and industry, will provide tailored advice to creative businesses via the [UK Climate Hub](#).
- The CIC will provide a forum for creative sub-sectors to share their experiences and best practice on sustainability (such as albert's [Climate Content Pledge](#)), and promote new initiatives and track the uptake of sustainable practices and skills across creative sub-sectors.
- AHRC and DCMS are co-funding two creative industries clusters based in Leeds and London to demonstrate our collective world-leading capability in advanced R&D for a sustainable and circular fashion sector, across the UK.

In addition, we will:

Ensure that the direct environmental impact of the sector is significantly reduced, capitalising on opportunities to generate new revenues.

- Defra is delivering the [Resource and Waste Strategy for England](#) and, in line with

this strategy, they are considering what framework of policy options would best reduce textiles and fashion waste and the environmental footprint of the sector, potentially using a range of powers from the landmark Environment Act 2021.

- The government is supporting industry-led change in the fashion and textiles sector through the [Textiles 2030](#) voluntary agreement, led by the Waste and Resource Action Programme.

Support sustainable innovation in the creative industries, helping the wider economy to reduce its environmental impact.

- UKRI is delivering the £15 million Circular Fashion Programme to encourage sustainable innovation in the fashion sub-sector. As part of this programme, UKRI have announced the winners of the £4 million recycling and sorting demonstrator programme. UKRI will work with other sub-sectors to explore further opportunities to support sustainable innovation.
- AHRC and the Design Museum are delivering the £25 million [Future Observatory: Design the Green Transition](#), which will support design-focused research and innovation to address the climate challenge. It is the largest publicly-funded design research and innovation programme in the UK.

Develop a strong evidence base on the impact of the creative industries on the environment to drive future policy and action.

- DCMS will work with the PEC to identify opportunities for further research into the environmental impacts and how

these can be mitigated, including how the creative industries can influence social and behaviour change and practices in the wider economy.

- DCMS has [commissioned](#) the Royal College of Arts, through the AHRC, to produce research into methods and tools used to measure the climate impacts of creative businesses to work towards

a consistent picture across the creative industries. The research – titled Carbon Measurement Tools in the Creative Industries – will aid monitoring of progress towards the net zero target and will be supported by the CIC, which will share evidenced insights on which measures are most effective in reducing emissions.



Grady & Robinson naturally dyed leather products.

Case Study: The Green Planet Augmented Reality (AR) Experience

The [Green Planet AR Experience](#) is led by Factory 42, an immersive entertainment and storytelling studio, and demonstrates how creative sub-sectors can be more agile, using new technologies to create content quickly and cheaply to reach wider audiences and deliver key messages about climate change action. This project, part-funded by the DCMS 5G Create Fund and supported by the UKRI Creative Industries Cluster StoryFutures, was inspired by the BBC series of the same name and gave the public the opportunity to explore our green planet as they never have before.

The project created an AR app for mobile phones. This unique immersive experience offered an exciting new way for audiences of all ages to learn more about the natural world. It allowed visitors to travel through five digitally enhanced worlds with Sir David Attenborough as their tour guide, in 4K volumetric capture video, including rainforest, freshwater, saltwater, desert and seasonal areas. Finally, the experience culminates in the human story of how we can all affect positive change in the environment.

More than ten thousand individuals attended the experience, which was held at Regent Street in London in early 2022. 99% of visitors left with a high environmental sustainability interest. A month after their visit, visitors were still positively changing their behaviour to be more sustainable, including buying environmentally-friendly products, using energy-efficient systems and donating money to environmental campaigns. This is one example of how creative thinking combined with the functionality of 5G and advanced technologies can affect positive change on global issues.

2030 Soft Power Objective: Creative industries increase their reach to global audiences, strengthening the UK's soft power and positive influence on the world

The [Integrated Review of Security, Defence, Development and Foreign Policy](#) identifies the creative industries as central to the positive perceptions of the UK globally. In 2023, the UK's creative and cultural sectors have helped us to rank second in the Brand Directory Soft Power Index.¹²⁵

The UK's creative industries are world renowned and have an unparalleled ability to connect with audiences from all backgrounds.

Many UK originating theatre productions such as Harry Potter and the Cursed Child and Leopoldstadt have been exported for successful Broadway runs, increasing the world-leading status of our creative industries. For instance, in recognition of the value of the Edinburgh Festivals to the international cultural landscape and as a platform for showcasing UK artists to the world, at Spring Budget 2023 the UK Government committed up to £8.6 million to support the Edinburgh Festival Fringe and Edinburgh International Festival.

Opportunities to connect globally are increasing with the growth of digital



Shaun the Sheep production.

“
The object of art is to give life a shape.

William Shakespeare

”

content distribution – globally, one in ten songs streamed are British¹²⁶ and the BBC has the largest reach of international news providers.¹²⁷ The creative industries are more export-driven than the rest of the economy and they have a track record of world-class innovation and creativity.¹²⁸ Building reach and awareness, our creative exports can inspire openness abroad and build trust in the UK as a country to visit and invest in.¹²⁹

As set out in Chapter One, creative businesses flourish through exports and international engagement. Micro-businesses, making up 94% of companies in the creative industries often lack the financial resources and skills to form and maintain these networks.¹³⁰ By helping creative businesses export and form partnerships, the UK benefits from greater mutual understanding and trust.¹³¹

The government will continue to support a thriving, diverse and independent creative sector at home, while providing creative businesses with more opportunities to reach global audiences and increase their international impact, including through digital means. This includes supporting exports as set out in Chapter One, but goes beyond this. There is a desire across the creative and cultural sectors to support worthwhile soft power opportunities, but some organisations (particularly small and midsize ones) lack the

knowledge, networks and skills. We will help our creative talent and businesses build wider reach and awareness and sustain mutually beneficial cultural connections.

The British Council (BC) has been at the forefront of building connections, understanding and trust between the UK and countries worldwide using the UK's expertise in art and culture. The BC works with over 200 countries and territories and its programmes support creative organisations to collaborate with international partners and raise their profile across the world. Alongside the Foreign, Commonwealth and Development Office's (FCDO) overseas network, the BC also provides advice and guidance on the ground for UK creatives looking to work with the cultural scene around the globe.

Initiatives can also be targeted at particular creative sub-sectors. In the screen sector, for example, the government's international co-production agreements have facilitated stronger cultural and economic ties between our creative industries and international partners, while helping to promote British film and television on the world stage.

Actions and Ambitions

To achieve our 2030 objective, we will retain the UK's position as a leading hub for culture and the creative industries, attracting and inspiring others globally. In working together

to grow exports, as set out in Chapter One, we will amplify the UK's reputation abroad. In addition to maximising creative exports, we will increase opportunities for creative industries' international exposure and strengthen global cultural relationships.

Headline actions

- The government will provide new funding of £2 million to London Fashion Week to support five fashion weeks from 2023-25 and £1.7 million to the London Film Festival 2024. This demonstrates our commitment to the UK's creative excellence at leading international showcase events, which enhance the UK's soft power and boost exports.
- The government is supporting Bradford to deliver the next UK City of Culture in 2025. This will showcase the best of the UK's creative industries to the world, attract new investment and boost pride in Bradford and the wider region. In 2024, we will launch the competition to select the UK City of Culture for 2029.
- AHRC will deliver the £80 million Research infrastructure for conservation and heritage science (RICHeS) programme, which will provide a network of facilities and expertise in conservation and heritage science that will secure the UK's reputation for excellence in the field, further capability in the sector and promote collaboration at a national and international level.

In addition, we will:

Ensure that the UK's creative industries increase their reach and awareness among international audiences.

- The UK has a long lasting tradition of artistic and media freedom, which the



Actors Colin Farrell and Brendan Gleeson attend a gala screening of their latest film at the BFI London Film Festival in October 2022.

- government will continue to champion in bilateral and multilateral diplomacy.
- The FCDO is supporting the BBC World Service, providing £94 million annually for the next three years and announcing an uplift of £20 million in March 2023.
- Through increased presence at key global events and platforms such as South By Southwest, the Venice Biennale and Seasons of Culture, we will amplify creative industries' international exposure, including through continued support from the [GREAT Campaign](#).¹³¹

- The 2023 Eurovision Song Contest, hosted by the UK on behalf of Ukraine, was a joyous and celebratory moment of culture and solidarity.

Ensure that UK creative organisations form more mutually beneficial international partnerships.

- The BC is providing capacity building and support on the ground to facilitate global partnerships, including with the potential to promote inclusivity, gender equality and environmental sustainability. The BC's [International Collaboration Grants](#) programme has provided grants to

support creative work through innovative ways of working and collaborating with international peers from 41 different countries, both digitally and face-to-face. The next rounds of awards will be announced in summer 2023. The BC also facilitates capacity building and peer-to-peer exchanges with growing creative economies and develops accessible resources such as NESTA's [Creative Enterprise Toolkit](#), which is available in 13 different languages.

- The UK Global Screen Fund's International Co-Production Strand, administered by the BFI, is helping UK producers to work collaboratively and create global projects for the world stage. It also extended support to Ukrainian filmmakers through the [European Solidarity Fund for Ukraine Films](#) in May 2023.
- UK publishers continue to promote Ukrainian voices at a time when they need it most, with the publication of books including Bloomsbury Publishing's *You Don't Know What War Is: The Diary of a*

Young Girl from Ukraine by Yeva Skalietska. UK publishers have also supported the [#BooksWithoutBorders](#) initiative, printing 16,000 Ukrainian language books for refugee children in the UK since the initiative was launched in September 2022.

Ensure that digital innovation offers new opportunities for international exposure and partnerships for the UK's creative industries.

- Following the [Boundless Creativity Report's](#) recommendation to explore how the UK's arts and culture sectors can reach new global audiences through digital content, DCMS and AHRC awarded a [research fellowship](#), to review what can be learnt from digital innovations during the sector's response to the coronavirus pandemic and how this has affected engagement with international audiences.
- The BC has also enhanced its digital offer, with more than 70% of its content expected to be delivered digitally from 2022 onwards.

Case Study: South by Southwest (SXSW)

SXSW, founded in 1987 in Austin, Texas, is best known for its annual conferences and festivals celebrating the convergence of tech, film, music, education and culture.

DBT has supported a strong UK presence at SXSW since 2008 and recently worked with trade partners to create a UK@SXSW2022 trade mission. DBT recruited around 20 companies to join the trade mission, who benefitted from a range of support before, during and after the event to get the most from their time at SXSW. The BC also showcases UK talent and innovation at this international platform every year.

As an example of UK soft power, the mission has successfully raised the profile of the UK creative sector – including the sub-sectors of music, advertising, screen, video games, mobile and immersive tech – by facilitating meeting programmes, panel sessions and networking opportunities. The trade mission showcased the broad range of UK creative sector capabilities and leadership to international audiences via more than 300 meetings over two days.

Music has been at the heart of the UK's presence from the start with the famed British Music Embassy. In 2022 the UK was able to showcase 50 up-and-coming British bands to perform in front of a global audience of potential publishers, record labels, brand/marketing agencies and influencers.

The CIC has also worked closely with SXSW organisers to ensure that Createch has a presence at the event, with panel sessions and demonstrations from innovative creative businesses. This has provided a platform to show the world and the tech sector how closely entwined the creative industries are with digital technologies.



Still from *Chicken Run*, Dawn of the Nugget.

DELIVERY

As we have outlined throughout this document, the creative industries are a sector of immense potential

Built on an innate talent for innovation and a fast-changing digital world of opportunity. The creative industries can grow and impact our lives in ways that few other sectors can. To maximise these impacts, we need to achieve the vision and objectives set out here for 2030. Working in partnership across the government and industry, in collaboration with the Devolved Administrations and local authorities, we will be proactive, ambitious and focused on delivery.

Creative Industries Council

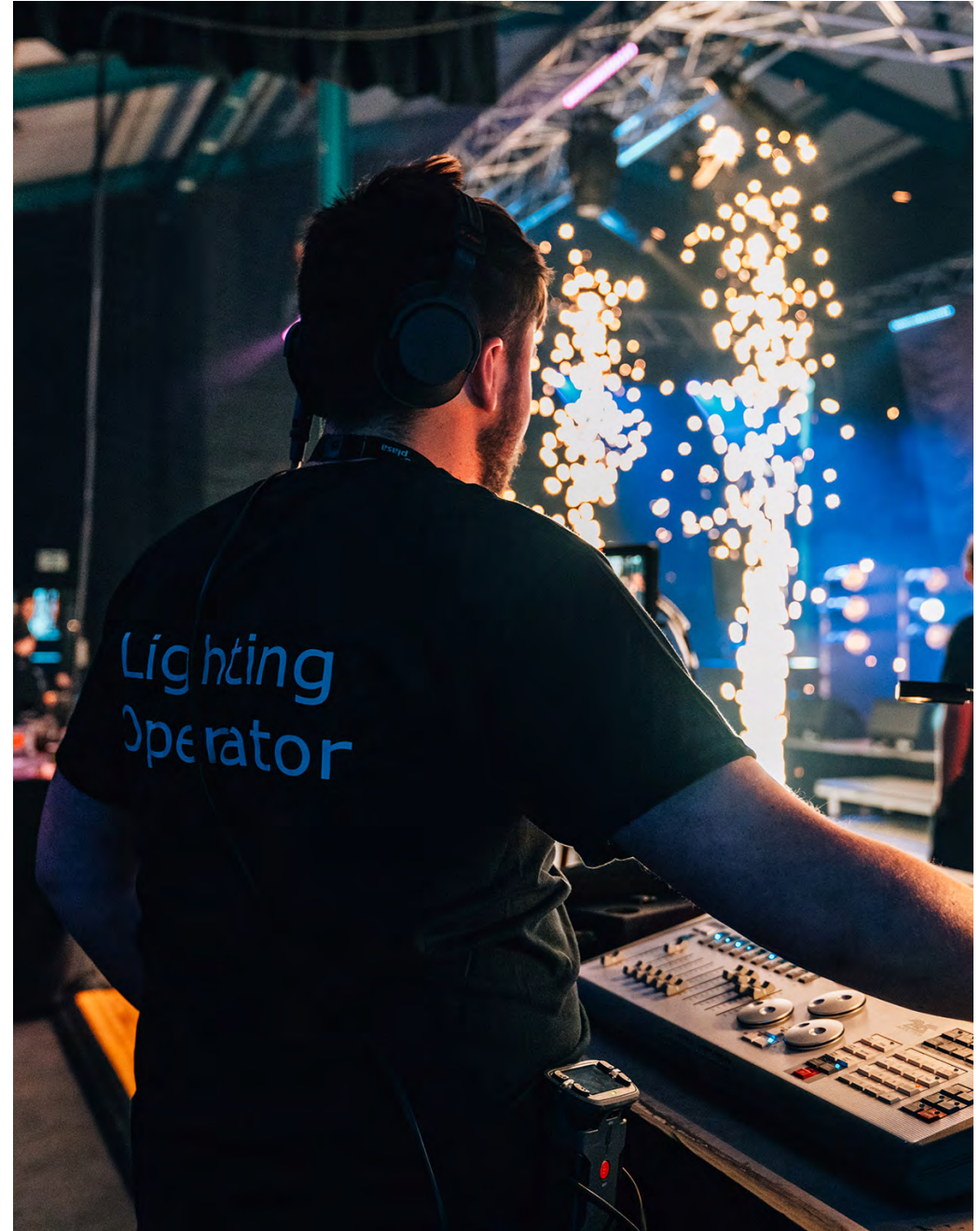
The partnership between the government and industry has been a cornerstone of the sector's success over the last few years, with the CIC facilitating discussions and bringing together the varied sub-sectors of the creative industries. The Council is a forum for discussion, knowledge sharing and problem solving, raising the ambitions for the sector to even greater heights. The CIC is co-chaired by Sir Peter Bazalgette and the Secretaries of State for DCMS and DBT. The CIC has helped us to respond to challenges and opportunities facing the creative industries in a collaborative way, as well as to deliver the 2018 Sector Deal.

With the publication of this Sector Vision, we are looking at this forum anew to ensure that it can convene, motivate and drive the delivery of the ambitions we have set over

the coming years. Through refreshing the CIC to align with the goals and objectives set out in the Sector Vision, we can ensure that we sustain momentum and together focus on delivery. The new CIC membership was put in place as of January 2023.

The DCMS, DBT and industry co-chairs of the Council have also brought in new industry experts, including representatives from digital creative businesses, to ensure that the Council reflects the changing nature of the creative industries and that more parts of it are represented, including creators and freelancers. The refreshed CIC will be visible to all parts of the creative industries and will work with the government to help drive delivery and support accountability for the goals and objectives set out in this Vision.

This Sector Vision sets out ambitions shared between industry and the government and as such, we are keen to work with all parts of the United Kingdom to support the UK's creative industries. We will facilitate collaboration across the UK through the refreshed CIC, which now has a membership that ensures each nation is represented. Furthermore, the governments from across the UK will set up a Culture and Creative Industries Interministerial Group. This will provide a forum for ministers to meet and share



Academy of Live Technology student working.

knowledge and best practice across culture and creative industries policy.

Data, Monitoring and Evaluation

Evidence is at the heart of the Sector Vision, and the government and industry are committed to improving data and the evidence base for the creative industries to strengthen our understanding of the sector's opportunities and challenges, as well as the impact of our interventions. As such, we are setting out an approach to monitoring and evaluation and developing the evidence base for the Sector Vision, which will consist of three elements:

1. An outcomes monitoring framework to track trends in key areas of the creative industries that the Sector Vision is seeking to influence: their growth, skills and the wider value to individuals and society, as per each of the Sector Vision's goals.
2. Evaluations of spending, governance or regulatory interventions, ensuring data and evidence is available to understand whether they have had the desired effect on their objectives and the goals in this Vision.
3. Research projects to build an understanding of current and future policy issues. These will inform decision-making and provide a more granular and targeted view of the impacts and lessons from the implementation of measures. This will include utilising research by the government, the PEC and from industry.

Further detail on the initial monitoring and evaluation framework is provided in Annex B, where we have provided an initial set of indicators for each objective.

While creative industries' sub-sectors share characteristics of creativity and innovation,



KS2 Spanish event at NFT1, BFI Southbank, BFI Southbank.

they are diverse in how they convert this into wealth and job creation. Therefore, data and evidence on industries and occupations needs to be collected at the most granular level to accurately reflect the diversity of creative sub-sectors. This is also necessary to reflect the different policy structures and therefore different definitions of the creative industries used by the UK and Devolved Administrations, as each uses the lowest level building blocks in the statistical classifications.

Also important is industry using its expertise to shape data and evidence

collection on the issues that matter most. Industry has a wealth of data and evidence that could be valuable for policy and allow researchers to investigate research questions in a new light.

DCMS will work with the PEC and other government departments to improve access to data and evidence that reflects the creative industries, and with industry representatives to scope out opportunities for analysis that supports growth and the Sector Vision objectives. We will also coordinate across sub-sectors to deliver best practice in data

collection and maximise the lessons to be learnt from the evidence.

DCMS looks to draw on a diverse set of knowledge and high-quality research to develop its evidence base and has published its [Areas of Research Interest](#) setting out research needs, including for the creative industries. DCMS invites researchers to connect with the department and become part of its networks, informing DCMS of existing evidence and working with DCMS to shape new research.



Edinburgh Napier University E11 Studio.

The Future

Publication is just the start for this Sector Vision. Between now and 2030, we expect this document to be used as a basis for further activity, inspiring action and supporting growth across the sector and the country. Within this framework, we will work together to develop further ambitious ideas and initiatives to grow the sector, meet its skills needs and explore how the creative industries can contribute to addressing the big challenges of our day.

The needs of the sector will continue to change fast, as the digital revolution rolls on. The state of the sector and support for the creative industries will be monitored, reviewed and adapted according to changing circumstances and technological advancements, to ensure we are supporting the sector in the most impactful way.

We have a strong foundation to build on and this will only become stronger as we bring more people into the fold, work more closely together and put our combined capabilities into action.



Video games reception at 10 Downing Street, 2023.

END NOTES

- 1 Compares output in Gross Value added over 2010-2019 and employment over 2011-2021. DCMS, Sectors [Economic Estimates](#) (2021)
- 2 When we refer to “jobs” and the “workforce” in this Vision we are referring to employed and self-employed roles.
- 3 Output measured by Gross Value Added is higher in February 2023 compared to February 2019 with the exception of ‘design and designer fashion’ and ‘film, TV, radio and photography’. DCMS, Sectors Economic Estimates – [Monthly GVA](#) (2022)
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- 8 This goal of a £50 billion increase in annual GVA by 2030 is compared to 2019 levels, as the latest reliable data available before the pandemic, and is based on projecting forward the compound average growth rate for 2010-2019. This represents the level of ambition set in this Vision and the scale of challenge we want to rise to.
- 9 This goal sets the level of ambition based on projecting the strong average workforce growth rate observed in the creative industries for [2011-2021](#) to 2030.
- 10 [UK Innovation Strategy](#); [Export Strategy](#); [Global Britain in a Competitive Age: Integrated Review](#); [UK Digital Strategy](#); [Skills for Jobs White Paper](#); [Resources and Waste Strategy](#); [Powering Up Britain plans](#).
- 11 This figure includes funding announced at Spending Review 2021 that is directly focused on growing the creative industries and its fastest growing sub-sectors. It does not include regular grant in aid to Arts Council England or to the British Film Institute, which totals c.£400 million per annum (ACE) and c. £20 million per annum (BFI). It does not include funding that indirectly supports growth such as £79 million for music education hubs and £25 million for musical instruments as part of the National Plan for Music Education, or those covered in Chapter Three (wellbeing and pride in place). Nor does it include National Lottery Funding or pan-economy interventions that support sectors beyond the creative industries (British Business Bank, DLUHC and DBT/DSIT funds and programmes). We recognise that what is and is not growth focused is ambiguous and not easily extrapolated, so Annex A presents the range of support mentioned in this document.
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- 14 DCMS, [Creative Industries Mapping Documents](#) (1998)
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- 18 Devolved matters are those areas where decision-making has been delegated by the UK Parliament to devolved legislatures in Scotland, Wales and Northern Ireland. Reserved matters are where decision-making sits with the UK Parliament at Westminster.
- 19 Education and training includes all levels of education, lifelong learning, and all training. Health and social care includes NHS and mental health. Culture and arts includes funding, national collections and national performing companies. Media matters include regulation of the press and media literacy. Economic matters include inward investment. Environment includes climate change, waste management, pollution and environmental protection.

- 20 Media includes broadcasting and the BBC. Financial and economic matters include most taxation such as VAT, corporation tax, tax reliefs (R&D and creative industries tax). Employment includes job search and support (with the exception of Northern Ireland where it is devolved). Trade and industry matters include competition policy, intellectual property, import and export controls, research councils (including arts), and the protection of trading and economic interests.
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IMAGE CREDITS

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Cover JM Enternational; **P2** Kingston School of Art; **P7** Aardman; **P8** Into Film 2030; **P9** BFI National Archive (image by Linda Ny Lind); **P12** Burberry, British Fashion Council Media Hub; **P13** Oliver Hyman; **P14** Rebellion; **P15** Advertising Association (Top); **P15** British Fashion Council Media Hub (Bottom); **P16** Creative Informatics, Chris Scott; **P17** Rebellion; **P19** Hundven-Clements Photography; **P20** Ultimate Picture Palace at night (image by Ian Wallman); **P22** Felix Speller; **P23** Jo Sealy; **P24** JM Enternational; **P27** Rory James; **P28** Philip Vile; **P29** Wild Photography; **P30** Into Film 2023; **P31** XR Stories; **P32** Storytrails; **P33** Lee Kirby; **P34** Academy of Live Technology; **P35** Linda Ny Lind; **P36** JM Enternational; **P38** Publishers Association; **P39** Tony Redmen; **P40** Johan Persson; **P41** Nick Dagger; **P43** Joshua Fray; **P44** Aardman; **P45** Darren Brade; **P46** Aardman; **P47** Academy of Live Technology; **P48** BFI; **P49** Edinburgh Napier University (Left); **P49** Simon Dawson

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