

Creative Industries Federation

How public investment in arts contributes to growth in the creative industries



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Tom Weldon - CEO Penguin Random House

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Executive summary:

This is the second of a series of policy reports from the Creative Industries Federation. The first focused on creative education and in this paper we turn our attention to the importance of public investment as part of the UK's unique mixed economy in the creative industries.

The creative industries in the UK are booming and an increasingly important part of the economy, with growth outgunning that in finance and insurance and employment up by 5 per cent between 2013 and 2014 against a 2.1 per cent UK average.

But the captains of industry who oversee the million-pound art sales, the publishing companies and the advertising conglomerates that returned £77 billion of direct GVA in 2012-2013 know that it is not just their business acumen that makes them a success story.

For the first time, top British entrepreneurs and business leaders, from Melanie Clore, chairman of Sotheby's Europe, to Tom Weldon, CEO Penguin Random House, internet businesswoman Baroness Lane-Fox to Caroline Rush, CEO British Fashion Council, explain in this report why they see public investment in culture as crucial to what they do.

They say that Arts Council funding for writers is a seedbed for publishers, that the Tate is a vital part of what has made London a global arts centre market, that great coding needs as much creativity as a poet and that fashion has always worked with artists for inspiration and the film business for red carpet profile.

In some ways, business is running ahead of the politicians where, despite the creative economy boom, the Department for Business, Innovations and Skills does not include the creative industries in its data on industrial growth and despite the excellent work of the BIS sponsored Creative Industries Council, policy responsibility for investment and growth in the creative industries is spread across several government departments and would benefit from strong and unified leadership.

Government has given major support with a string of new tax incentives to promote everything from video games to orchestras on top of the longer-established breaks for film in a move that promotes both commercial and subsidised enterprises.

Tax incentives are a vital and welcome part of a mixed economy of revenue streams. They do not necessarily help to build and maintain infrastructure or vital education and outreach in the way that public investment does. Neither do tax breaks mitigate the risk for private investors in the way public investment can at the high-risk stage of idea development.

Figures from Cameron Mackintosh Ltd to film financiers Ingenious Media acknowledge recipients of public investment - or subsidy - are providing vital training, R&D and ideas which underpin the broader growth in the arts and creative industries.

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Without two years of development by the Royal Shakespeare Company, there would have been no *Les Misérables* as a West End staple. The Arts Council gave small grants to organisations on a street in Hull that will now be at the heart of its year as UK City of Culture; private investment followed. Choreographer Matthew Bourne's company received £3 million in project grants in the last decade but returned £12 million to the Treasury.

The arts and culture sector has welcomed the government's decision to increase their share of lottery good causes since 2010 although grant-in-aid support, focused on rewarding a track record of quality and success, whether through the Arts Council, DCMS grants to the national museums and galleries, or local authority support for libraries and regional theatres, has fallen in recent spending rounds. ACE grant-in-aid is down 29.4 per cent in the last five years and accounts for only 0.1 per cent of public expenditure. The UK invests a smaller percentage of its total GDP on arts and culture than European competitors like France and Germany and the EU average.

The arts have become more entrepreneurial to increase revenues from earned income and private and philanthropic investment but its leaders are clear that a bottom line of public investment is crucial to the mixed economy that has made British arts the envy of the world. Sustained investment will benefit not only the arts themselves but the broader creative industries who acknowledge the interdependence of the sectors and are thriving in consequence. It is a success built on the tiniest of public investments. Imagine the economic potential if investment were increased.

This report was produced in partnership with Arts Council England.

Cutting-edge creative industries are hungry for talent and ideas. Britain has both and it is in no small part due to our investment in the arts over the last half-century - in schools, in universities and through public funding for our visual and performing arts.

We are the envy of the world for the dynamism of our creative industries. This report makes clear the contribution made to their success by the people and institutions in the arts. Let's make sure we continue to underpin our global position by maintaining our investment in culture - and working together with individuals and businesses in the commercial sector to continue to find smart new ways of leveraging that investment even further.

Damon Buffini - RSC Board Member and Founding Partner, Permira

The nation's investment into the publicly funded arts is without a doubt a key driver of the next generation of talent for the creative industries. There is no question that it enriches advertising. This is partly in a linear sense - we try to hire creative people from various backgrounds. But I also believe that creativity is such a difficult concept to pin down that no creative idea in any field is given birth to in isolation. All build on thinking and inspiration that comes from a person's cultural life. In the UK, we stand on the shoulders of giants.

Chris Hirst - European CEO Havas global communications and advertising



Introduction:

We stand on the shoulders of giants.

The United Nations define the UK's creative industries sector as being at the crossroads between the arts, business and technology¹. It is therefore clear to those who work and interact with the sector that their growth depends on continued public investment in the arts to support the development of ideas and talent on which the creative industries and wider creative economy depend².

There is a 60-year history of successful public investment in the arts that has established the bedrock for growth in the wider creative industries. We want to see continued public investment in the arts to build on these foundations for future growth and success.

- The GVA of the creative industries, including the public arts experienced growth between 2012-2013 of 9.9%, which is higher than any other industrial sector, including financial services³.
- The UK now invests a smaller percentage of its GDP in arts and culture than the EU average and less than European competitors like France and Germany⁴.
- Recent estimates suggest that our publicly invested arts still return 0.4% of the UK's GVA and contribute indirectly to GVA through tourism, overseas trade and regional growth⁵.
- The public arts are significant employers and indirectly a source of support for jobs in the commercial creative industries⁶.
- The public arts provide essential R&D (research and development) for creative ideas before business is able to invest. Public investment at the R&D stage often leverages private investment.
- Public investment fosters creative places and spaces, which promote our creative industries internationally and provide inspiring environments to work, live and thrive.

Sustained public investment ensures that:

- Our impressive heritage of world-class museums, galleries and other key cultural institutions maintain their infrastructure, generate income and, through free access, inspire the ideas and imagination that characterise the creative industries.
- Over 660 National Portfolio Organisations (NPOs) are supported by Arts Council England (ACE); Creative Scotland supports 119 Regularly Funded Organisations (RFOs); Arts Council Wales supports 72; Arts Council Northern Ireland supports 114. These organisations receive public investment for a three-year period in order to develop and deliver artistic excellence and contribute to other strategic objectives that support growth, diversity and training in the wider creative industries⁷.

As we continue to produce more films, TV series, video games and stage shows here in the UK, Warner Bros. hires the very best talent the country has to offer. To support this diverse pool of exceptional talent, and **to ensure the UK maintains its position as a global leader of creative industries, we welcome and encourage both public and private investment in UK artists across the board.**

Josh Berger - President and Managing Director, Warner Bros. Entertainment UK



- Public investment in the arts and film supports high-impact diversity and access programmes that advance the economic success of the creative industries, as well as benefitting society more generally.
- Public investment in the arts supports the regional growth that is essential to the future of the creative economy as the examples of Liverpool, Manchester, London, Bristol, Hull, Newcastle and other cities demonstrate and also supports growth in grassroots local arts and culture across the UK.

The raw materials of the creative industries, including the publicly supported arts, are talent and ideas. Therefore, investment in innovation and R&D across the creative industries is essential for economic and employment growth. Even IT, software development and digital games, which account for nearly 50% of the creative industries contributions to domestic GVA and exports, rely to some extent on public investment for growth⁸. 37% of video games businesses surveyed in a TIGA study depend on public grants and government financial schemes⁹. Software developers can claim reductions from their corporation tax of up to 225% of the money invested into R&D and even loss-making businesses can claim up to 33% of expenditure¹⁰.

The speed of the growth of the creative industries and the imperative for maximizing the UK's creative potential depends upon an environment that encourages innovation and rewards enterprise. As new private/public synergies are emerging, there is a vital need to ensure a pipeline of creative talent and original ideas for economic as well as cultural growth, and there is potential for even greater growth by diversifying the creative workforce and investing in regional regeneration.

The landscape will continue to evolve. For these reasons it's important for there to be sources of public investment to identify, seed and nurture new and unforeseen initiatives designed to meet present and future needs as well as to support existing public arts organisations and initiatives in particular.

With public investment in the arts we will have more businesses in the creative industries, more and more diverse artists and creatives, and further unique ideas with the potential to become commercial success stories.

It is worth noting that some of the data we use in this report is necessarily specific to England, rather than representative of the UK as a whole. It has not always been possible to source comparative data for the other nations of the UK. Where this is the case it is indicated in the endnotes. The arguments that we make, however, are appropriate to apply across the United Kingdom. The latest data on GVA is from 2012-2013¹¹, whereas the latest data on employment is for 2013-2014¹². We have indicated which years data is from and treated GVA and employment findings accordingly.

Artists, designers and the fashion industry have always worked together - in the 1970s Andy Warhol famously worked with Yves Saint Laurent, and more recently architect Zaha Hadid designed the mobile Chanel Pavilion gallery. Theatre and film work directly with the industry through requests for costumes, and red carpet events that often showcase the best of British. More generally, fashion designers (whether world famous or up-and-coming) need to be inspired by access to theatre, film, galleries and museums. Our great retail stores also benefit from existing in cultural spaces, which benefit designers attempting to produce artistic work. Conversely, our museums can benefit from fashion recognised as art - as was seen in the Alexander McQueen showcase 'Savage Beauty' at the V&A. **Put simply, the British fashion industry depends on a great public arts scene to continue to thrive.**

Caroline Rush - CEO British Fashion Council



The UK thrives on human ingenuity and skill.

Creativity in terms of the impact of creative occupations, Intellectual Property and creative talent is a key UK resource for future growth in GVA and employment¹³.

The UK's creative economy includes the contributions of creative occupations outside the creative industries, including marketing and sales directors embedded in manufacturing firms, graphic designers in engineering organisations and website and software designers working within our financial services¹⁴. The creative economy, now accounts for 5.8% of all UK jobs. Employment has increased by 5.0 per cent between 2013 and 2014 compared to a 2.1% UK average and by 13.7 per cent since 2011¹⁵.

The UK's creative industries sector, as a sub-sector of the creative economy, has now grown from 4% of the UK's GVA in 1997 to 5% in 2013. The GVA of the creative industries experienced growth between 2008 and 2013 of 26%¹⁶, which is higher than the figure for financial and insurance activities (13.1%)¹⁷ and returned £77 billion of direct GVA in 2012-2013¹⁸ and 8.8% of total UK exports in 2012¹⁹. Exports by the UK creative industries have increased by 34.2% between 2009 and 2013 and account for 8.7% of total exports of services for the UK in 2013²⁰.

More than 1 in 12 jobs in the UK are in the creative economy and employment has increased by 5.0% between 2013 and 2014 compared to the increase in jobs in the wider UK economy of 2.1%²¹. The number of jobs in the creative industries increased by 5.5 per cent between 2013 and 2014²².

Showing similar patterns of growth, the public arts, a sub-sector of the creative industries, contributed 0.4% of the UK's GVA in 2012-2013, an increase of 19% compared to a 3.3% UK average²³ and a 9.2% increase in employment compared to the 1.6% UK average²⁴.

In addition the arts are linked to 42% of inbound-tourism related expenditure²⁵. British films, often supported by direct public investment, generated £1.4 billion of exports with a trade surplus of £916 million in 2013²⁶.

Public arts produce ideas, talent, R&D and technical brilliance that feed into creative businesses from advertising and architecture to design and IT software. The UK is a world leader in the creative industries because it has a unique blend of public and private investment, which enriches us culturally and economically.

This must also be the model for growth in the UK's creative industries. We need sustained, effective and strategic public investment in the arts working in partnership with the global commercial success of our creative industries.

With estimates that 35% of all occupations will become automated in the next two decades, the future will belong to the highly skilled creative workforce that make up the creative economy and its sub-sectors whose human ingenuity and skill cannot be replaced by robotics²⁷. It is this workforce that we need to grow.

The success of the UK's commercial art scene is intrinsically linked to the strength of its public institutions. Three of the five most visited art museums in the world are in London - the Tate, the British Museum and the National Gallery - and we are able to thrive, attracting buyers from across the globe, precisely because we form part of one of the world's great cultural hubs. Public investment has been crucial in providing the training and institutional support necessary to propel artists from the UK to the forefront of the global art market, with over a third of our record-breaking July 2015 contemporary art sales comprised of work by British artists. **Investment in world-class public programmes is a vital component in helping the UK to punch well above its weight as leaders in a hugely competitive global art market.**

Melanie Clore - Chairman of Sotheby's Europe

People don't always recognise the link between the technology sector and the UK's public arts. But to be a great coder you need to be as creative as a poet or a designer. It is precisely this parallel which has encouraged me to not only advocate for the technology sector, including coding in schools, but to work with the Design Council and the Women's Prize for Fiction, advocating for creativity across the board. **When we inspire each other we end up with a stronger society as well as a stronger economy, and having public arts organisations is an important part of the puzzle.**

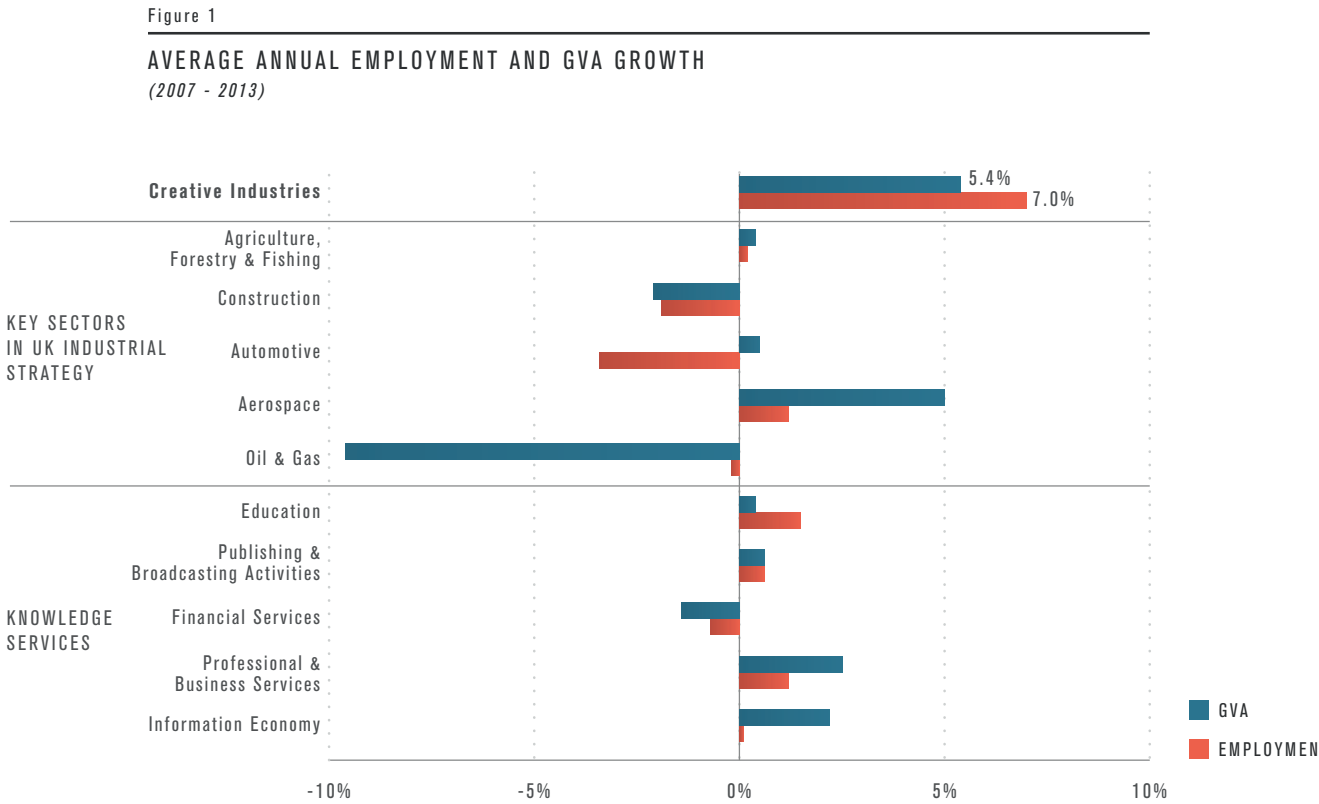
Baroness Lane-Fox - Philanthropist and Public Servant



We argue that the remarkable growth in employment in the creative economy, and in the GVA of the creative industries and the public arts are connected. They feed each other in an ecology of growth in the UK’s economy which is itself increasingly dependent on creativity as a key resource.

Investment leads growth.

The creative industries have not always been seen as central to the government’s growth agenda. This is perhaps why data on industrial growth provided by BIS (the Department for Business, Innovation and Skills) does not recognise the creative industries as a sector or acknowledge its phenomenal rates of growth when compared to other sectors²⁸.



This government is now recognising the success story of the creative industries and BIS can further recognise the need to drive an industrial strategy that supports growth across the creative and cultural sectors.

The challenges and obstacles as well as the plan for growth identified in the Creative Industries Council’s *Create UK Strategy²⁹ require a joined-up policy response from government. Under the leadership of the Secretary of State for Culture, Media and Sport, priorities and resources must be brought together from other lead departments who contribute to the growth of the creative industries ecosystem, including HM Treasury, the Department for Business, Innovation and Skills, the Department for Communities and Local Government, the Department for Education and others.

In 1991 there were perhaps seven international, contemporary commercial art galleries in the UK. The number now is in the hundreds. London is without doubt one of the major art centres in the world; 25 years ago it was considered a backwater. **This success, I believe, is due to the UK's investment in the art schools of the 70s and 80s, and the excellence of the generation of artists educated there, and the growth in investment and popularity of our public institutions, now envied across the world.** Without this investment, the quality and interest in British art will reduce, as will the jobs and tourist pounds it delivers.

Matthew Slotover - Co-founder, Frieze

London theatres are doing record business, generating nearly £100 million of VAT receipts for the Treasury in 2013. Yet commercial theatre does not operate in a vacuum - **we rely on public investment in the arts for many things - funding the education and training of actors and technicians, supporting artists and writers in taking creative risks to develop their talent and enabling innovative productions to be brought to the stage.** We created the original British adaptation of Les Misérables with the help of the RSC in 1985 after two years of development backed by public investment. It was a huge risk at the time, but Les Misérables has since gone on to become London's longest running musical, seen by more than 70 million people in 42 different countries.

Robert Noble - DMD Cameron Mackintosh



Total spend by central and local government in England in the publicly supported arts and culture (inclusive of museums and libraries) represents 0.7% of the total public spend in England. Spend on ACE represents 0.1% of total public spend in England³⁰. Recent estimates suggest that the UK's public arts return 0.4% of the total UK GVA³¹. Even when judged purely by economic returns this demonstrates how a relatively small amount of public investment in the arts can generate growth in GVA as well as significant levels of employment across the UK.

There are other less visible ways in which public investment in the arts makes a significant contribution to the growth of the UK's economy- via 'brand' and international standing. According to the GfK-Anholt Nation Brands Index Britain was the 3rd best nation in terms of having an exciting contemporary culture and has been a consistently high performer in that index³². Data from the International Passenger Survey from 2011³³ shows that, of those travelling to the UK, 27% of people visited museums or art galleries while here, and 9% engaged with the performing arts. The numbers were even higher for people here on holiday at 43% and 14% respectively. UK Film is a significant source of export earnings generating £1.4 billion in 2013 with a trade surplus of £916 million. In addition, the British Council has demonstrated that interest in opportunities to do business with people and organisations from the UK is significantly higher among participants in cultural activities with the UK³⁴.

The arts mean business.

Historically public investment in the arts has been seen as investment in a public good rather than an economic intervention. NPOs are charities with strict limits on their income generation potential. There is a tradition of public investment both directly in the arts and into the pipeline of education and training that has provided the foundations for today's creative industries. More recently lottery funding and tax incentives have diversified the sources of public investment in the arts, although in the context of reduced levels of direct public funding through grant-in-aid. Grant-in-aid funding for ACE, for instance, has reduced by 29.4% in real terms from 2010/11 to 2014/15³⁵.

Over the last 20 years organisations in receipt of public investment have been encouraged to access additional sources of finance from income generation, private and philanthropic investments, requiring an entrepreneurial spirit that is unique to the UK. It represents a third-way between the US model where the arts are almost entirely dependent on private and philanthropic investments and EU countries like Germany where public funding is enshrined in their constitution. Data in **Figure 2** shows that NPOs have successfully exploited additional sources of revenue to decrease their dependency on public investment³⁶.

I was drawn to the communications design industry because it uses a fusion of creative and business skills. magneticNorth was established in 2000 and I still love working with the wide range of companies who engage us from the BBC to M&S. Digital technologies help us to be constantly innovative and evolving, always carrying forward new learnings from every project we deliver.

Inspiring projects call for inspiring people, and those we employ have a range of design and technical skills, an insatiable appetite for the new and a strong creative ambition as well as the ability to work in a highly collaborative way. **Manchester, with its world class creative heritage, vibrant culture and economy, civic pride and incredible array of educational organisations is the perfect environment to enable creative companies like magneticNorth to thrive, now more than ever.**

Lou Cordwell - Founder and CEO of magneticNorth



Figure 2

NPO INCOME

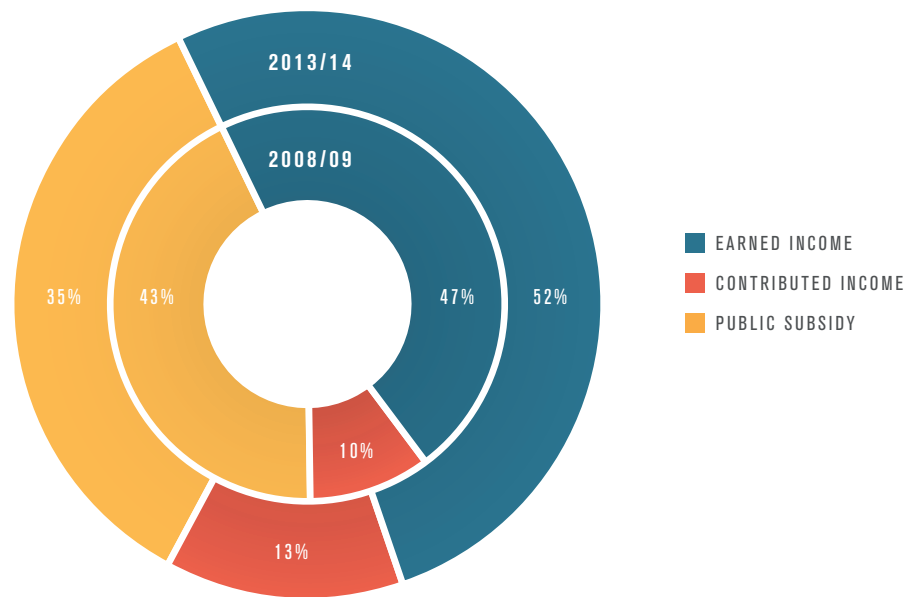
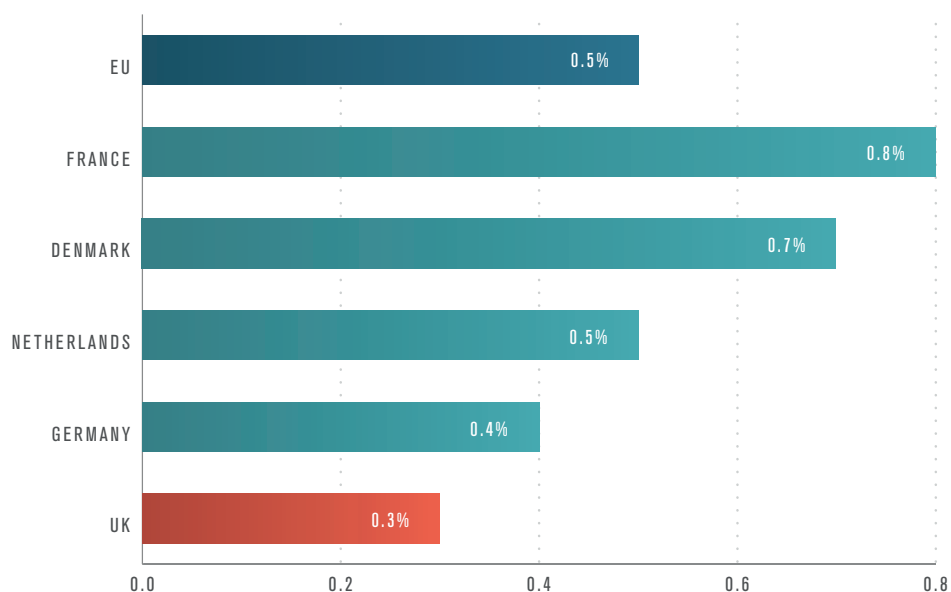


Figure 3 shows that at 0.3% the UK invests a smaller percentage of its total GDP on arts and culture than the aggregate equivalent of 0.5% for the EU³⁷, and less than European competitors like France at 0.8% and Germany at 0.4%. But no other EU country benefits from the level of GVA that the UK's public arts return, nor uses public spend on the arts as a catalyst to grow the creative and digital resources that super-charge growth in the wider creative economy.

Figure 3

TOTAL GENERAL GOVERNMENT EXPENDITURE ON CULTURAL SERVICES
(% of GDP 2013)

Design is a British success story. The UK has the largest design sector in Europe and the second largest in the world, after the USA. It's also the fastest-growing sector within the creative industries, increasing 24% in 2012-13 (compared to 4% in the economy as a whole). **Britain has the world's oldest Design Council and we lead the world in exploiting the value of design for growth, thanks to smart investment from government in supporting a skilled workforce and through working with the Design Council to empower and inspire businesses to unlock the huge potential of design.**

John Mathers - CEO Design Council



There are limits to the extent to which NPOs and other cultural organisations will be able to make up for reductions in grant-in-aid by increasing revenues from earned income and private and philanthropic investment without fundamentally damaging the unique cultural and artistic strengths and gifts that infuse the creative industries ecosystem and the wider creative economy. A shift towards earned income will inevitably impact on the capacity of arts organisations to offer a high standard of products and services at a reasonable cost, to provide the vital R&D and talent development that inspires the creative industries and to extend the reach of the arts into the lives of underrepresented communities and people.

Crucially, it will mean that many small regional organisations and experimental companies may struggle with long term implications for both the economy and society.

Tax incentives are an important part of the mixed economy.

The increase in earned income shown by our publicly supported arts and film recipients has begun to erode the traditional distinctions between the public arts and commercial businesses, and between not-for-profit and for-profit business models.

Recently introduced tax incentives for theatre and orchestras represent additional support and a shift from direct investment to incentivising growth. For commercial and public theatre organisations, these are worth up to 25% of touring costs and 20% for all other productions. Orchestras now benefit from up to 25% relief on qualifying expenditure.

Tax incentives are also available to film, high-end TV, animation, video games and children's TV as a mechanism by which to incentivise production in these sectors and create jobs. They are a major and welcome contributor to growth in the arts and creative sectors, and they complement current levels of public investment through grant-in-aid. In 2013-14, the film tax relief provided support to over 320 films being made in the UK. Since relief was introduced in 2007, over 1,200 film productions have made claims for a total of £1.3 billion³⁸

Tax incentives sit alongside grant-in-aid incentivising production but they are not a strategic tool to build and maintain infrastructure, business resilience or education and outreach. This is something that only targeted investment such as grant-in-aid can do, through place making, training, experimentation and longer term support for business and artistic planning.

We are all only as good as our last creative idea. If we want to be a country of innovators we need to be constantly creative. To become creative, innovative and imaginative, we need to expose ourselves to new ideas. A vibrant arts and culture community is the easiest way to make this happen. The games industry has benefited enormously from increasingly sophisticated classical music soundtracks played brilliantly by orchestras like the Philharmonia. Many games developers now pay large sums to classical composers to write scores for their games, exposing a new generation of young people to classical music while enhancing the creative experience of playing these games. **We have to stop thinking about arts and culture as simply nice to have. They are just as important as well-maintained roads and bridges.** By giving us the chance to stimulate our minds with new ideas and experiences, they give us the opportunity to become more creative. Arts and culture are infrastructure for the mind.

Ian Livingstone - Co-founder Games Workshop and former Chairman of Eidos

No one would ever want to live in a city without culture. Culture is the fuel that drives the urban metropolis. Artists, literary thinkers, designers and directors feed our souls and our imaginations, offering both a mirror and a chance to escape.

Boris Johnson MP - Mayor of London⁴¹



Public investment leverages private investment and earned income.

Public investment can also be used as a means of attracting commercial interest- with successful results. In 2015, three of the six BAFTA nominees for Outstanding British Film were supported by the Film Fund and *Pride* won a Best Debut BAFTA. *Philomena* was nominated for Best Picture at the Academy Awards³⁹.

In some cases non-profit arts organisations have produced their own massive commercial hits - such as *Matilda The Musical*, *War Horse*, *The Curious Incident of the Dog in the Night-Time* - as part of their portfolio of products, which has helped them to offset reduced levels of public funding and build reserves for the future.

The UK's orchestras make a substantial contribution to the commercially successful film and video games industries, which in turn enables them to leverage an additional £2 of private investment for each £1 of public investment, the equivalent to the average leverage from all NPOs. Great British orchestras, including the LSO, The Philharmonia, the LPO and the RPO, are responsible for the soundtracks of some of our most successful cultural exports, including the Harry Potter films, television shows like *Downton Abbey* and computer games including *Halo 4* and *Killzone*. Orchestras in the UK are given an international edge by their funding structure- with public funds allowing them to diversify their audience, tour outside London, and continue to educate themselves and others⁴⁰.

The public arts are key to regional growth.

The government recognises that regional growth is key to the future success of the economy, particularly if the creative economy is to grow in GVA and employment. A quarter of Local Enterprise Partnerships (LEPs) have stated that the creative industries are a priority sector⁴².

Although there are success stories of thriving creative industries and cultural participation across England, it is not an entirely positive story. There is still a significant imbalance between London and the regions. 47.6% of creative industries jobs are in London and the South-East of England alone which, aside from agriculture and finance and insurance, makes the creative economy the most unevenly distributed part of the UK's economy⁴³.

There are strong links between cultural growth and activity and the growth of regional economies and creative industry employment. Liverpool attracted 9.7 million additional visits during its time as EU Capital of Culture, generating an economic impact of £753.8 million⁴⁴.

Under 25s make up 40% of Birmingham's population - we are young, diverse and digital. Birmingham is home to 6,000 tech firms employing nearly 40,000 people. 25% of the UK's gaming workforce is based locally, and digital tech firms boost the region's economy by in excess of £1.6 billion every year.

Talent is brought together in initiatives and areas such as the Innovation Birmingham Campus, The Custard Factory, Fazeley Studios, Entrepreneurs for the Future (e4f) and Oxygen Accelerator with geographical concentrations in Digbeth and the Jewellery Quarter. **The city's multicultural character and access to universities and other educational establishments provide creative employers with a steady flow of talent and our diverse and vibrant cultural scene helps us to attract and retain this talent.**

*Anita Bhalla - Chair of Creative City Partnership,
Board member LEP and Chair Performances Birmingham*



The devolved nations in particular have potential for growth in the creative industries and economy. Currently Scotland has 6.9% of the Creative Economy jobs in the UK, Northern Ireland has 1.6% (the lowest of all regions) and Wales has 2.9%. With investment, we believe that recent growth can be accelerated.

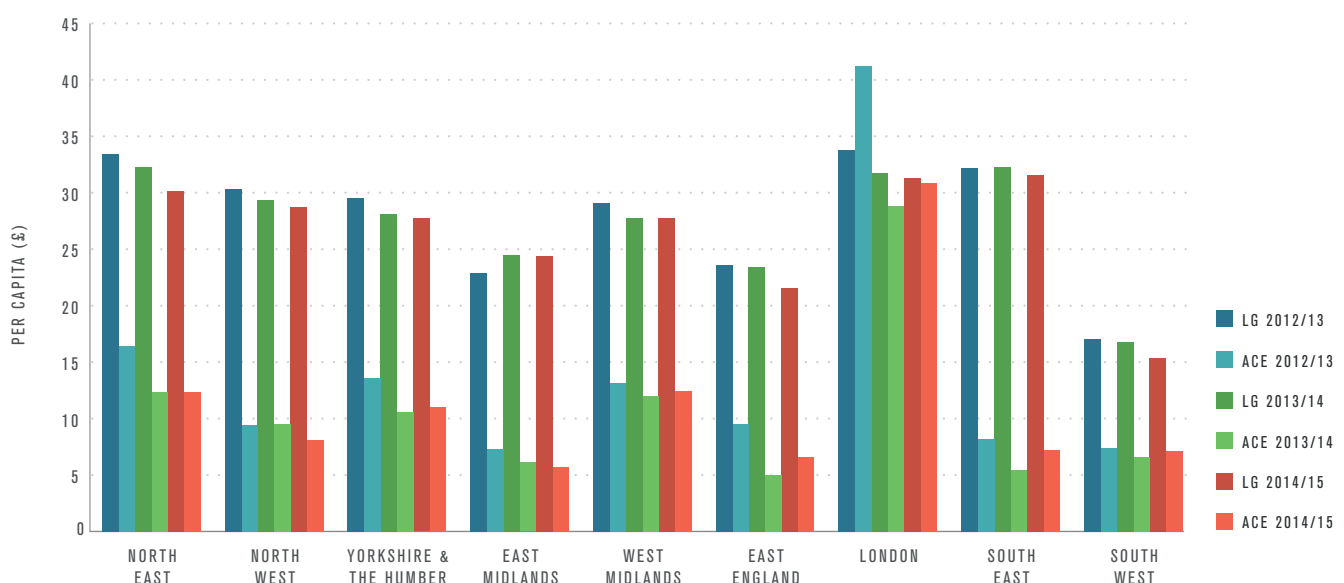
It is now recognised that public investment in the arts is essential to ensure that they are experienced by all, wherever they live, and for providing access to experiences and education that both benefit our least advantaged citizens and inspire individuals and communities to be creative, and in so doing contribute to local creative and cultural growth. An Arts Development: UK and Arts Council Wales study found that 90% of local authorities surveyed had partnerships with external arts and cultural organisations in 2014 compared to 82% in 2012⁴⁵, which indicates an increasing trend towards cultural commissioning by local authorities to deliver a wide range of services including health and wellbeing as well as business and regional development.

In 2013-14 Local Government invested £1.5 billion in cultural services to their communities of which £805 million was spent on libraries, which are vital cultural assets⁴⁶. ACE distributes £611 million to the regions for arts services only⁴⁷, but which also includes some support for libraries⁴⁸.

Figure 4 shows that levels of local government spending, inclusive of spending on libraries, are fairly evenly distributed across England but are on a downward trajectory. ACE funding is not as evenly distributed and this makes local government support in some regions crucial for enriching the cultural lives of local communities and boosting local creative and cultural growth. But many local authorities are facing real dilemmas in maintaining levels of spending on arts and culture whilst providing core services to their most vulnerable communities and fulfilling civic responsibilities. As a result local government spending on arts and culture has fallen by 25% since 2007/08⁴⁹.

Figure 4

LOCAL GOVERNMENT SPENDING AND ACE INVESTMENT
(2012/2013 - 2014/2015)



On the day that Hull was named UK City of Culture the local paper carried the headline - 'The day the city changed forever'. Some felt it was an overstatement but public investment in culture was to trigger a new confidence in private investment. With over 20 local and national companies sponsoring Hull's bid to show private sector support alongside local authority and Arts Council cash, there was clear evidence that business saw benefits in culture changing the fortunes of a city. Hull launched a £25 million public realm strategy, now being implemented by Arups and local developer Wykeland was announced as lead partner for cultural-led regeneration on the Fruit Market, investing £15 million in a new digital centre @TheDock. The near derelict wasteland of Humber Street had seen small Arts Council grants support a jewellery gallery, a museum of club culture, music and festival activity. It is now a street full of scaffolding as private investment follows public to see the arts as the permanent solution rather than a 'meanwhile use'. £20 million of positive media coverage has already seen a 15% increase in hotel income and a turnaround in retail. The University of Hull saw an 8% increase in students for its cultural programmes.

Andrew Dixon - Director of Culture Creativity Place and Visiting Professor of Cultural Policy University of Hull.

To have inspired, creative companies, Britain needs to produce an inspired, creative workforce. This is not just about school education, but involves developing communities which are able to interact with the arts at all levels. On a practical note, Hearst employees often work with the publicly funded arts - these institutions perform an important role in offering a new perspective and inspiration to all of our most successful creative industries.

Anna Jones - Chief Executive, Hearst Magazines UK



This overall downward trajectory in Local Government spending is alarming given that **Figure 4** shows that with the exception of London, the rest of the regions are heavily reliant on Local Government spending for their arts and libraries.

Hull will be the second UK City of Culture in 2017 and already has demonstrated that growth in employment, GVA and cultural confidence can flow from a city rallying around their creative and artistic heritage and future. Public investment has made it possible for the city to ‘come out of the shadows’⁵⁰.

The Public arts are a source and resource for creative talent.

Public investment supports the identification, diversification and training of creative talent. 60.5% of creative industry workers are graduates compared to a UK average of 31.8%. But 92.1% of workers were from advantaged social and economic backgrounds compared to a UK average of 66.0%⁵¹. In the creative media sector alone 14% of workers were educated in independent schools which represent only 7% of the population⁵².

Despite an encouraging 34.3% increase in the number of BAME workers in the creative industries between 2011 and 2014, they still only represent 11.0% of the creative industries workforce, compared to 14.1% of the overall population of England and Wales and 40% in London where there is a high concentration of creative industries⁵³. In England, 12% of the creative and cultural workforce is classified as disabled⁵⁴ compared to 18% of the general workforce⁵⁵. Women held 36.7% of jobs compared with 47.2% in the whole UK economy⁵⁶.

The range of experiences, cultures and forms of expression in the creative industries is enriched by public investment targeted on accelerating social mobility and diversity in the creative workforce.

The UK has invested in exceptional training routes for the publicly supported arts that also support graduates who move into advertising, fashion, design, publishing and other creative economy and creative industry settings. Public investment of £60 million includes support for specialist creative Higher Education and training of proven world-class standards in terms of their graduate employment records⁵⁷. Public investment also supports the cost-intensive training offered in our small independent schools that provide the dancers, musicians and actors needed to maintain the UK’s internationally recognised standards of artistic excellence. Budgets to support investment in our world-class HE centres of excellence are under considerable pressure, and must be maintained if we are to stimulate the supply of creative talent on which the creative industries depend⁵⁸.

The vitality of the commercial sector in the visual arts depends very heavily on public investment in our art schools, galleries and museums. This vitality can be narrowly expressed as the livelihood of artists, the success of the commercial galleries and auction houses. More broadly, it includes the graphic arts, design, film and aspects of television and has a major impact on tourism and the economic success of our cities.

These centres of learning and inspiration have trained and brought to public attention successive generations of artists from Moore, Riley and Hockney to Whiteread, Doig and Hirst. The art schools attract students from across the world. They are internationally recognised centres of research, developing talent that plays leading roles in the creative industries across the world. Our galleries, like Tate Modern, the Whitechapel or Nottingham Contemporary show the artists and create the public interest that stimulates an art market, in which London has become the principal centre alongside New York.

In recent years substantial investment in institutions and people in Europe and America has attracted talent from the UK and is now quickly eroding our lead. Public investment creates the nursery for our success and future generations will not forgive us if we fail to plant seed for the next crop.

Sir Nicholas Serota - Director, Tate

To create an equal society we must have arts and culture that are available to everyone. This doesn't just mean having doors open to all, but actively trying to approach and interact with those who may not feel our artistic institutions are 'for them'. If we strip away funding, it is diversity and access programmes that suffer with knock-on effects right through society.

Melanie Eusebe - Chair and Co-founder of the Black British Business Awards



Public money has also been invested more directly into projects that help practitioners to skill up. The Creative Skillset Skills Investment Fund uses matched public/private funding to produce £32 million of support for training that provide crucial entry into the workplace and skills support in the creative industries⁵⁹ and the Creative Access organisation plays a vital role in brokering paid internships for talented BAME creatives to work in the film and media industries. The ACE Creative Employment Programme delivered by the National Skills Academy supports up to 6,500 new apprenticeships, pre-apprenticeships and paid internships (graduate and non-graduate) across the arts and cultural sector,⁶⁰.

Social objectives for public investment have merged with economic imperatives. The conditions for granting public money to arts and cultural organisations increasingly stress accountability for meeting targets that are in the national interest. These include excellence and financial sustainability but also reflect the need to ensure that the arts are diverse, inclusive and available nationwide⁶¹. All three of these priorities serve important national social objectives that are also economic imperatives for the creative industries and the creative economy.

Creative innovation and growth in any sector depends on a diverse workforce, as McKinsey has recently demonstrated. In Diversity Matters they showed that gender-diverse companies are 15% more likely to outperform their competitors and ethnically diverse companies are 35% more likely to outperform⁶². The drive for diversity in the publicly supported arts, supported by clear links to public investment conditions, is a major initiative and exemplar for increasing the diversity of the creative industries workforce as a whole.

Through public investment in projects designed to attract more socially and ethnically diverse arts audiences we ensure that the commercial potential of a diverse range of ideas and talent are realised. The publicly supported arts as well as being an important source of diverse talent and experience to the creative industries as a whole also invest in education and community outreach that nurtures tomorrow's creative talent and consumers.

There would be almost no commercially viable independent film-making in the UK without public money through BBC Films, Film 4, BFI, film production tax credit, Enterprise Investment Scheme, Creative England and Screen Yorkshire. Although at Ingenious we do not spend public money ourselves, we would not fund, whether through debt and/or equity variants or other financial instruments, films like *Pride*, *Testament of Youth*, *Mr Turner*, *Selma* and *Suffragette* (forthcoming) without being able to work with partners who are able to share the risk by drawing upon these vital sources of funding which, together, typically add up to between a third and half of production cost.

Martin Smith - Special Adviser, Ingenious Media

New Adventures makes a significant contribution to the UK's economy, over the last decade generating over £12 million for the Treasury. Arts Council England investment enables us to take risks in creating brave new productions and touring to all parts of the UK, including to smaller theatres that otherwise would not be financially viable..

In return, New Adventure acts as R&D by building skills and expertise across the creative industries, enabling talented individuals to develop their careers. It has employed 900 dancers, musicians and creative industry professionals across 16 live productions since 2004. Musicians are employed to perform live and New Adventures provides promotional opportunities for instrumentalists and conductors. In addition, musicians are employed to record specially composed and arranged scores. Other creative industry professionals include carpenters, electricians, flymen, sound and lighting designers and operators, wig, wardrobe and makeup experts, stage and company managers, rehearsal and resident directors. New Adventures provides promotional opportunities, including for dancers moving into management and directorial roles.

Matthew Bourne - Artistic Director, New Adventures



Intellectual property as the raw material of the creative industries.

There is a high degree of risk of market failure in investing in the early stages of idea development; at the point at which it is not certain that an idea is commercially viable and likely to produce a return on investment. It is an inevitable corollary of creative work that there will be ideas that fail to become marketable intellectual property, for every commercially successful one. As many of the case studies in this document suggest, public investment at the high-risk stage of idea development mitigates the risk of market failure for private investors. Public investment encourages risk and experimentation in order to develop ideas to a stage where private investors are willing to accept the risk and invest in moving an idea into the supply chain. For instance, about £50,000 was spent on a series of experimental workshops at the National Theatre (NT) Studio for *War Horse*, and its first production at the NT in 2007 cost around £500,000. It has now been seen by over 5.5 million people worldwide and earned the NT a surplus of £12 million⁶³.

A sustained level of public investment in the arts has resulted in the creative and artistic edge that distinguishes the West End from Broadway and which has led to the phenomenal world success of some of the best ideas incubated in the publicly supported arts, such as *Les Misérables*, *Matilda*, *12 Years a Slave* and *The King's Speech*. Less commercially successful and experimental ideas generated in the publicly supported arts also inspire commercial producers and drive technological innovation and design trends across the creative economy.

In 2011-2012 ACE NPOs commissioned 27,913 new works from 14,758 artists⁶⁴. Very few of these commissions will become box office hits but they provide the laboratory conditions for developing artistry, technology and spinoffs that benefit the wider creative economy. Public investment in the market failure of the arts is essential to ensuring the supply of original, brave, experimental work that underpins and inspires commercial success stories. If left to private investors, unwilling to take unacceptable levels of risk on uncertain returns on investment, the UK's creative output would be damaged economically and in terms of international prestige.

The visual and performing arts consist of 30,800 enterprises, according to 2011 estimates, and this is the second-largest number of enterprises in the creative industries after software and e-publishing⁶⁵. Many of these enterprises depend on public investment in order to survive and thrive in the creative industries supply chain, particularly in order to transform their raw materials into distinctive and successful products and services. This is often done through using public investment to buy in or supply services to the wider creative industries supply chain.

Publishing is a business but we are part of an ecosystem which needs public investment to flourish. Not only does the Arts Council invest in new writing talent, but it also supports the educational infrastructure which nurtures the brilliant new authors, designers, and digital marketers of the future.

Tom Weldon - CEO Penguin Random House

The Union Jack is without doubt the most vibrant marketing tool of the United Kingdom. It defines 'togetherness' both in historical and present day contexts. That same flag feeds many facets of everyday life including culture.

The nourishment that public investment provides to culture in the UK is essential in maintaining the prestige and excellence needed to operate and flourish in a worldwide market. In its wake comes social cohesion, development and innovation, research, inspiration and economic growth, to name but a few.

Nicolas Mansfield - Artistic Director, Nederlandse Reisopera



The raw materials of I.P. in the creative industries are brought to market through a complex interaction of creative, technical, marketing, management and other processes. The transformative stage of the creative industries supply chain is immensely complex and often involves multiple sources of expertise. A theatre production may employ external freelancers and SMEs for a wide range of needs including technical, digital creative, marketing, administration, sourcing, design and craft making etc. The production of a film may be even more complex in the outsourcing of its production processes.

The publicly supported arts and film are significant employers of a wide range of creative occupations in the commercial sector and contribute directly to their GVA. Many creative organisations are small business-to-business operations feeding the needs of other organisations, including the arts and film, within the creative industries and are dependent on the success of the creative supply chain as an integrated whole to survive and flourish⁶⁶.

90% of businesses in the creative industries are self-employed individuals and estimates of the number of freelancers range from an average of 23% to 45%⁶⁷. A quarter of the arts and culture industry's supply chain is accounted for by the creative industries, representing almost £2.2 billion 2010. The arts and culture industry in the UK is indirectly a significant source of support for jobs in the commercial creative industries⁶⁸. This is one reason why we so often see artists and creative businesses working in the same locations and doing business with each other⁶⁹.

Notes.

- 1 United Nations Conference on Trade and Development (2004) Eleventh session São Paulo, 13–18 June 2004 Creative Industries and Development. Available from: http://unctad.org/en/Docs/tdxibpd13_en.pdf
- 2 For the purposes of this document the Creative Industries Federation defines the publicly supported arts as artistic and cultural entities that receive direct public funding from Arts Council England, the Department of Communities and Local Government, the Department of Culture, Media and Sport and the British Film Institute. In addition to these sources of central government grant-in-aid funding 20% of Lottery returns go to the publicly supported arts and 20% to heritage. The UK government spent £3.1 billion on arts and culture in 2013-14, 41% of which is contributed by the local government. The majority of the recipients of publicly supported arts funding are Charities with strict controls on their ability to fully develop their commercial potential. We have found it difficult to source comparable data from Scotland, Wales and Northern Ireland. Where we have this data it is specified in the text.
- 3 DCMS (2015) Creative Industries Economic Estimates January 2015 Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/394668/Creative_Industries_Economic_Estimates_-_January_2015.pdf
- 4 Eurostat. Available from: http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=gov_10a_exp&lang=en

National levels of spending on the following are measured: Provision of cultural services; administration of cultural affairs; supervision and regulation of cultural facilities; operation or support of facilities for cultural pursuits (libraries, museums, art galleries, theatres, exhibition halls, monuments, historic houses and sites, zoological and botanical gardens, aquaria, arboreta, etc.); production, operation or support of cultural events (concerts, stage and film productions, art shows, etc.); grants, loans or subsidies to support individual artists, writers, designers, composers and others working in the arts or to organisations engaged in promoting cultural activities.
- 5 DCMS (2015) Creative Industries Economic Estimates January 2015. Figure used for publicly invested arts based on music, performing and visual arts group.
- 6 Cebr (2015) Contribution of the arts and culture to the national economy London; Arts Council England

DCMS (2015) Creative Industries Focus on Employment Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/324530/Creative_Industries_-_Focus_on_Employment.pdf
- 7 Data provided by Arts Council England, Arts Council Wales, Creative Scotland and Arts Council Northern Ireland
- 8 DCMS (2015) Creative Industries Economic Estimates January 2015.
- 9 TIGA Sources of Funding: The Sinews of Business TIGA.ORG Available from: http://www.tiga.org/repository/documents/editorfiles/onlinesubscribers/tiga_sources_of_finance_document.pdf
- 10 <http://www.pwc.co.uk/tax/issues/research-and-development-tax-credits.jhtml>
- 11 DCMS (2015) Creative Industries Economic Estimates January 2015
- 12 DCMS (2015) Creative Industries Focus on Exports Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/439742/Annex_D_-_Creative_Industries_Focus_on_Exports_2015.pdf
- 13 The leading economist Gerard Lyons makes the point that the successful economies of the future will require cash, commodities or creativity. The UK is particularly rich in and dependent on the human ingenuity and skills of its creative workforce. Lyons, G (2014) The Consolations of Economics London: Faber & Faber

The ecology argument has been well articulated in Holden, J. (2015) The Ecology of Culture London: AHRC

- 14 Bakhshi, H., Freeman, A. & Higgs, P. (2013) A Dynamic Mapping of the UK's Creative Industries. London: Nesta. Available from: <http://www.Nesta.org.uk/publications/dynamic-mapping-uks-creative-industries>.
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- 16 DCMS (2015) Creative Industries Economic Estimates January 2015
- 17 BIS Growth Dashboard Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/396740/bis-15-4-growth-dashboard.pdfhttps://www.gov.uk/government/uploads/system/uploads/attachment_data/file/396740/bis-15-4-growth-dashboard.pdf
- 18 DCMS (2015) Creative Industries Economic Estimates January 2015
- 19 DCMS (2015) Creative Industries Economic Estimates January 2015.
- 20 DCMS (2015) Creative Industries Focus on Exports
- 21 DCMS (2015) Creative Industries Focus on Employment
- 22 DCMS (2015) Creative Industries Focus on Employment
- 23 Cebr (2015) Contribution of the arts and culture to the national economy London; Arts Council England
- 24 DCMS (2014) Creative Industries Focus on Employment Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/324530/Creative_Industries_-_Focus_on_Employment.pdf
- 25 Cebr (2015) Contribution of the arts and culture to the national economy London; Arts Council England
- 26 BFI (2015), Economic Contribution of the UK's Film, High-End TV, Video Game and Animation Programming Sectors (report by Olsberg SPI and Nordicity) Available from: <http://www.bfi.org.uk/education-research/film-industry-statistics-reports/reports/uk-film-economy/economic-contribution-uks-film-sectors>
- 27 Bakhshi, H. Frey, C.B. and Osborne, M. (2015) Creativity Vs Robots – The Creative Economy and the Future of Employment London: Nesta Available from: http://www.nesta.org.uk/sites/default/files/creativity_vs._robots_wv.pdf
- 28 DCMS (2015) Creative Industries Economic Estimates January 2015 and BIS Growth Dashboard. Information Economy, education and professional and business services also listed as key sectors. Other sectors (life sciences, nuclear and off-shore wind) not included due to availability of comparable data.
- 29 Creative Industries Council (2014) *Create UK Strategy. Available from: http://www.thecreativeindustries.co.uk/media/243587/cic_report_final-hi-res-.pdf
- 30 In 2013-14, local authority revenue expenditure in England on arts, theatres, museums and libraries totals £1.3bn: <https://www.gov.uk/government/statistics/local-authority-revenue-expenditure-and-financing-england-2013-to-2014-individual-local-authority-data-outturn>

Central government spending reached £1.8bn over the same period. <https://www.gov.uk/government/statistics/public-expenditure-statistical-analyses-2013-update-for-2015-16>

Together this equals £3.1bn which is 0.7% of the total England public spend of £456bn.
- 31 Cebr (2015) Contribution of the arts and culture to the national economy London; Arts Council England

- 32 British Council research identified the top 5 things that made Britain attractive overseas: (1) Cultural and historic attractions (2) Cities, (3) Arts, (4) Countryside and landscape and (5) History. Culligan, K., Dubber, J. & Lotten, M. (2014) *As Others See Us: Culture, attraction and soft power*. London: British Council and Ipsos MORI. Available from: <http://www.britishcouncil.org/organisation/publications/as-others-see-us>.
- The 'Anholt-GfK Roper Nations Brands Index', which ranks the global reputation of fifty countries by looking at perceptions of nations in the six areas: exports, governance, culture, people, tourism and immigration/investment, puts Britain in fourth place.
- 33 See <http://www.visitbritain.org/culture-heritage-attractions>
- 34 <http://www.britishcouncil.org/sites/britishcouncil.uk2/files/culture-means-business-report-v2.pdf>
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- 36 Data provided by Arts Council England. Public subsidy includes funds from ACE, local government, and other public sources. 2008/09 public subsidies from ACE was £435m, 2013/14 was £456.
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- 38 Data provided by the British Film Institute
- 39 Data provided by the British Film Institute
- 40 Data provided by Arts Council England and from Association of British Orchestras (2015) *A Sound Investment; the mixed economy model of British Orchestras*. Available from: http://www.abo.org.uk/media/20083/ABO-A-Sound-Investment_mixed-funding-policy-brief_webV-.pdf
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- 46 DCLG Local authority revenue expenditure and financing. Available from: <https://www.gov.uk/government/collections/local-authority-revenue-expenditure-and-financing>
- 47 Data from DCLG and Arts Council England.
- 48 <http://www.artscouncil.org.uk/what-we-do/supporting-libraries/>
- 49 The National Campaign for the Arts (2014) *Arts Index - A measure of the vitality of Arts and Culture in England*. [online]. Available from: [http://static.guim.co.uk/ni/1426519638916/NCA-Arts-Index-07-14-\(web\).pdf](http://static.guim.co.uk/ni/1426519638916/NCA-Arts-Index-07-14-(web).pdf)
- 50 <http://hull2017.co.uk/>
- 51 DCMS (2015) *Creative Industries: Focus on Employment 2015*
- 52 Creative Skillset (2015) *Workforce Survey 2014* Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/324530/Creative_Industries_-_Focus_on_Employment.pdf

- 53 DCMS (2015) Creative Industries: Focus on Employment 2015
- 54 As defined by the Disability Discrimination Act. Find out more: <http://www.legislation.gov.uk/ukpga/1995/50/contents>
- 55 Based on 2012 data from Office for National Statistics Annual Population Survey data commissioned by Creative and Cultural Skills (2012) cited in: Parkinson, A., Buttrick, J. & Wallis, A. (2014) Equality and Diversity within the Arts and Cultural Sector in England: Evidence and literature review final report. Manchester: Arts Council England and Consilium Research and Consultancy. Available from: http://www.artscouncil.org.uk/media/uploads/Equality_and_diversity_within_the_arts_and_cultural_sector_in_England.pdf
- 56 DCMS (2015) Creative Industries: Focus on Employment 2015
- 57 Institutional Specific Teaching Allowances from HEFCE support leading institutions in performing arts, visual arts and design <http://www.hefce.ac.uk/lt/howfund/institution/>
- 58 <http://creativeaccess.org.uk/>
- 59 http://creativeskillset.org/who_we_help/creative_businesses/skills_investment_funds
- 60 <http://ccskills.org.uk/supporters/funding/england/the-creative-employment-programme/the-creative-employment-programme>
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- 69 Markusen, A., Gilmore, S., Johnson, A., Levi, T. & Martinez, A. (2006) Crossover: How artists build careers across commercial, non-profit and community work. [online] Available from: <http://www.haassr.org/wp-content/uploads/2014/05/caCrossover.pdf>

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