THE UNIVERSITY OF WARWICK

THE WARWICK COMMISSION

Enriching Britain: Culture, Creativity and Growth

The 2015 Report by the Warwick Commission on the Future of Cultural Value

University of Warwick

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Foreword from the Vice-Chancellor of the University of Warwick

I am delighted to welcome the report of the fourth Warwick Commission, *Enriching Britain: Culture, Creativity and Growth*.

Our commissions seek to make a lasting impact on society. We use our intellectual curiosity to analyse challenges that concern our communities, our nation and our world. We then offer practical, realistic recommendations to policymakers on how we can meet those challenges. As the 7th highest ranked university for research in the UK, we are committed to ensuring that our research has tangible impact outside the academy, and the Warwick Commission offers the perfect opportunity to put our research excellence to practical use.

Our Commission on the 'Future of Cultural Value' is no exception. Provocation was built into the evidence-gathering process in the form of lively public debates, which stimulated intense discussion across the country around our investment in the arts, the UK's cultural education and the role of the Culture and Creative Industries in carving out Britain's global status.

We truly value culture and creativity at Warwick. The Warwick Arts Centre – the largest venue of its kind in the UK outside London – lies at the heart of our campus and plays an integral part in university life. Our Faculty of Arts leads the nation in teaching and research, with many departments frequently topping the league tables, and creativity plays a key role in the Warwick Business School, which prides itself on bringing creativity and innovation to companies. That's why we've been keen to put our energies into investigating the social, economic and artistic value that culture brings to Britain. It's why we've organised our boundary-breaking researchers into multidisciplinary projects and creative collaborations with other distinguished figures.

To lead the commission, and to co-ordinate the wider research programme, we were pleased to draw upon the expertise of Professor Jonothan Neelands from the Warwick Business School and Dr Eleonora Belfiore from the Centre for Cultural Policy Studies. The membership of the Commission was carefully selected to reflect as broad a range of skills, experience and expertise as possible. I am extremely grateful to all the external Commissioners who agreed to work with us and offered their time and knowledge so generously. In particular, I would like to thank the Commission's Chairman, Vikki Heywood CBE. As Chairman of the RSA and former Executive Director of the Royal Shakespeare Company, she has brought to the Commission a wealth of expertise and expertise, and her contribution has been invaluable.

I would also like to thank our strategic partners – the British Council, Cheltenham Festivals, the Design Council and the RSA – whose support has been vital to the progress of the Commission's work. Finally, the Commission is grateful to those individuals and organisations who took the time to submit evidence, thereby enriching and broadening the scope of the report. This was a truly collaborative undertaking and I believe that, together, we can continue to make a constructive contribution in this arena.

I commend this report to you.

Nigel Thrift

Professor Sir Nigel Thrift, February 2015

About the Warwick Commission on the Future of Cultural Value

The Warwick Commission on the Future of Cultural Value has conducted a 12 month inquiry into how Britain can secure greater value from its cultural and creative assets.

Launched in November 2013, the Commission has been culturally led and academically informed. It has reviewed a wide range of inputs and analysis, including:

- Evidence and testimony from over 200 individuals from across the arts, culture and heritage sectors, the creative industries, organisations responsible for arts development and training, government bodies and academics.
- Insights from those knowledgeable about culture: those who make, market, consume, teach, learn, and enjoy art.
- Four Commissioner evidence days, which explored themes including education and talent, and valuing and investing in culture.
- Three high-profile public debates, including contributions from Robert Peston, Sir John Sorrell, Graham Sheffield CBE and Munira Mirza, amongst others.
- Targeted evidence and research reviews from key staff across the University of Warwick.

Commissioners participated and advised as individuals. As a group they developed the recommendations set out in this report, but these do not necessarily represent the policies or strategies of their institutions or organisations.

The analyses and recommendations in this report are the product of broader in-depth research. Further resources, including briefing documents, responses to our open call for evidence and interviews, can be found on the Warwick Commission website:

http://www2.warwick.ac.uk/research/warwickcommission/futureculture

The Commissioners were:

Chairman:	
Vikki Heywood CBE	Chairman, RSA
Tony Ageh OBE	Controller, Digital Archive, BBC
Hasan Bakhshi MBE	Director, Creative Economy, Nesta
Sir Peter Bazalgette	Chairman, Arts Council England
Damon Buffini	Main Board Member, RSC; Founding Partner, Permira
Deborah Bull CBE	Director, Cultural Partnerships, King's College London
Dinah Caine CBE	CEO, Creative Skillset
Professor Geoffrey Crossick	Director, AHRC Cultural Value Project
Darren Henley OBE	Managing Director, Classic FM
Roly Keating	Chief Executive, The British Library
Dr David Lan CBE	CEO and Artistic Director, Young Vic
Ruth Mackenzie CBE	Artistic Director, Holland Festival
Paul Roberts OBE	Chair of the Board of Trustees, Creativity, Culture and Education
Jenny Sealey MBE	Artistic Director, Graeae
Sir Nicholas Serota	Director, Tate
James Yarker	Artistic Director, Stan's Cafe

Foreword by Vikki Heywood

The key message from this report is that the government and the Cultural and Creative Industries need to take a united and coherent approach that guarantees equal access for everyone to a rich cultural education and the opportunity to live a creative life. There are barriers and inequalities in Britain today that prevent this from being a universal human right. This is bad for business and bad for society.

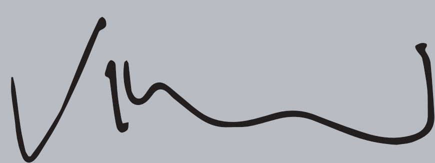
The Commission set itself the challenge of crafting a blueprint for greater cultural and creative success – towards a national plan for how culture and creativity can further enrich Britain. One of the strengths of the British people is our diverse culture and shared values – to be critical, curious, creative, tolerant, open minded and inventive. It produces the ideas, talent and enterprise that characterise the Cultural and Creative Industries, makes us proud of our achievements as a culturally rich and diverse society, and is at the heart of what makes us an attractive nation internationally.

As we focused on the evidence, three insights came to the fore:

- The extraordinary cultural and creative talents we share contribute to the well-being of our society, our economic success, our national identity, and to the UK's global influence. These are precious returns, a powerful cocktail of public good and commercial return. They need to be recognised more fully, invested in more intelligently, and made available to all.
- Culture and creativity exist in a distinct ecosystem. They feed and depend on each other. The points of connection between the Cultural and Creative Industries are where the potential for greatest value creation resides – culturally, socially and economically.
- Insufficient attention has been paid to the synergies between the interlocking sectors of the Cultural and Creative Industries Ecosystem. There is already a flow of talent, ideas, and public and private investment across and between the Cultural and Creative Industries. This flow needs to now be better identified and encouraged.

Not enough is being done to stimulate or realise the creative potential of individuals, or to maximise their cultural and economic value to society. Improvement requires a greater degree of investment, participation, education and digital access. The workforce in the sector is growing over four times faster than the UK's workforce as a whole and we believe a coherent approach to our Cultural and Creative Industries is a vital national priority.

A successful economy and a healthy, creative, open and vibrant democratic society depend heavily on this flourishing Ecosystem. It is a condition for individual creativity, identity, expression and freedom. The Ecosystem is a superconductor of creative talent and ideas that benefit our society and enrich Britain socially and economically. We hope this report will help galvanise action that builds on our success to date.



Vikki Heywood CBE, February 2015.

Enriching Britain: Culture, Creativity, and Growth

1

Introduction

1
The UK's cultural and creative success

Through an extensive process of consultation and review of research and policy, the Warwick Commission now presents its final report as a blueprint for Britain's cultural and creative enrichment.

We can be proud that British fashion, architecture, publishing, craft and design, film and TV, video games and software, museums, theatre, dance, popular and classical music and visual arts are internationally recognised as world class. 1.7 million people work in these industries. Together they contribute almost £77bn in value added, equivalent to 5.0% of the economy. The latest DCMS estimates show that they grew by 9.9% in 2013, higher than any other sector.[1] Allowing for the contribution of creative talent outside the creative industries, the creative economy's share may be approaching one-tenth of UK's economy.[2]

These industries have an impact on us as individuals and in our shared culture – they shape our arts, contribute to our view of the world, influence our consumer choices and improve the enjoyment of environments in which we live and work. They also shape the way in which we are perceived by others around the world.

The Cultural and Creative Industries are now recognised as one of the mainsprings of the British economy and their future sustainability and growth need to become a priority for the nation. We must begin to care about, understand and invest in our cultural and creative assets in the same way that we value and plan for health, education and welfare. Too often we have let our historical advantage in key industries be eroded by our international competitors. To sustain our success we need to invest in and support our world-class Cultural and Creative Industries and the cultural and creative traditions that feed them and make them special.

2
Scaling up success

Since 1998, Government has recognised the important contribution that the creative industries make to our economy. In 2014, the Department for Culture, Media and Sport (DCMS) introduced new classifications and metrics for measuring the economic performance of these industries.[3] The Creative Industries Council has recently produced **Create UK* as an industrial strategy for promoting further growth of the sector.[4] The Arts and Humanities Research Council (AHRC) is running a large-scale research programme to understand better the value of the arts and culture in ways more varied than economic value alone.[5] Arts Council England, the AHRC and Nesta have funded a major three-year programme of work on digital Research and Development (R&D). Nesta's recent pamphlet on *The New Art of Finance* presents new thinking on how to bring additional finance into the arts and make public money work harder.[6] The Heritage Lottery Fund and the RSA have recently announced 'Heritage and Place: Phase 2' – an initiative for applied research into the potential role of heritage in local strategic planning and development.[7]

The newly formed Creative Industries Federation represents a wide range of cultural and creative businesses and organisations and will be a powerful unifying and lobbying group for the sector.[8] At the same time, British Council research has shown the significance of culture in shaping the UK's place in the world, what makes it attractive to others, and how it supports trade and tourism.[9]

These are all important initiatives which the report's recommendations seek to support. There is momentum and a live opportunity to amplify and grow Britain's cultural and creative strengths.

3
Achievable goals for growth and enrichment

In developing our blueprint for growth we have identified five goals to ensure that the Cultural and Creative Industries can fully enrich Britain. In the report that follows we give a more detailed account of the challenges and opportunities for each goal area and present supporting recommendations. For ease of reading, each chapter will be structured in the following way: Goal, Context, Challenges, Recommendations.

The Commission discovered that there is a dynamic flow and exchange between different parts of the Cultural and Creative Industries which is vital to their future success. We have adopted the term Cultural and Creative Industry Ecosystem to capture and encourage this reality. The sum is greater than the parts and each part makes its contribution to the whole.

The Cultural and Creative Industries Ecosystem

The sum is greater than the parts and each part makes its contribution to the whole.

3.1
Investing in the ecosystem

Goal 1:
A Cultural and Creative Ecosystem generating stronger cultural wellbeing and economic growth and opportunity for all citizens and communities.

More needs to be done to build national cross-party support for a new national plan and investment case to support the Cultural and Creative Industries Ecosystem and underpin the **Create UK* industrial strategy.

Strategic investment from a wider range of private and public sources is essential to future growth. The **Create UK* strategy identifies important barriers to investment, with detailed attention to the commercial creative industries; the Commission focuses on the public and private investment required for the growth of the cultural sector in particular.

Both sectors depend on private and public investment. Tax incentives for film, TV, software development, theatre and orchestras are essential to the Ecosystem but so are other forms of public investment in supporting R&D, testing new ideas and developing new talent. Traditional 'non-profit' arts and cultural organisations are discovering new income streams, marketing their commercial potential and attracting private investors. Stimulating this variety of investment and income is a vital priority.

The Warwick Commission believes strongly that further reduction from current levels of public investment will undermine the Ecosystem, creating a downward spiral in which fewer creative risks are taken, resulting in less talent development, declining returns and therefore further cuts in investment. Without adequate baseline investment we cannot expect to maintain, let alone build on, our current cultural and creative success and our leading international role.

3.2
Using the diversity and range of talent in our society to enrich the ecosystem

Goal 2:
Production and consumption of culture and creativity should be enjoyed by the whole population and deliver the entitlement of all to a rich cultural and expressive life.

Greater diversity is essential to the future success of the Ecosystem and our society. Our cultural identity is made up of the fusion of ideas, creativity and traditions that have long been part of the British identity together with those of people who have come from across the world and have become part of our culturally rich, diverse and multicultural society.

Despite commitment to the inclusion of the whole population, diversity of the creative workforce, leadership and consumers remains a key challenge to the future success of the Cultural and Creative Industries and to the cultural wellbeing of the British public. Making decisive progress is both a social and economic imperative, and work needs to be done across the Cultural and Creative Industries Ecosystem to achieve this goal. We cannot fully enrich Britain unless we do.

3.3
Fully harnessing the importance of creativity in education and skills development

Goal 3:
A world-class creative and cultural education for all to ensure the wellbeing and creativity of the population as well as the future success of the Cultural and Creative Industries Ecosystem.

Education and skills development are essential in order to maximise our nation's full creative and cultural potential. The key to enriching Britain is to guarantee a broad cultural education for all (through arts skills acquisition, participation in arts and cultural events and enhanced appreciation), an education and a curriculum that is infused with multi-disciplinarity, creativity and enterprise and that identifies, nurtures and trains tomorrow's creative and cultural talent. The English education system does not provide or encourage either of these priorities and this will negatively impact not just on the future of the creative industries but on our capacity to produce creative, world-leading scientists, engineers and technologists.

As the evidence in this report demonstrates, children born into low income families with low levels of educational qualifications are the least likely to: be employed and succeed in the Cultural and Creative Industries; engage with and appreciate the arts, culture and heritage in the curriculum; experience culture as part of their home education and have parents who value and identify with the cultural experiences on offer from publicly funded arts, culture and heritage.

3.4
Maximising the opportunities created by the digital age

Goal 4:
A thriving digital cultural sphere that is open and available to all.

We are only fifteen years into the digital millennium and it is clear that creative and innovative uses of technology are essential to future success. The lesson from industries as wide-ranging as visual effects and video games to broadcasting and digital media is that the Cultural and Creative Industries are driving technological progress as well as benefiting from it.

The digital revolution has increased levels of participation in informal cultural and creative activity and has expanded the universe of artists. It has created new networks and forms of interaction, transformed the production and distribution of established art and cultural content and allowed new forms of art and culture to emerge. It has also enabled many more people to access UK culture internationally and has the potential to reach still more. But we can do more to exploit the opportunities offered by digital media to broaden interest in and access to culture by enhancing the experiences of consumers and producers alike.

The public sector has a vital role to play in supporting digital R&D in the Cultural and Creative Industries, which is aimed at innovative content production, audience engagement and financial models, and at exploring ways of creating new forms of cultural and social value as technologies evolve. Publicly supported organisations should be expected to share the insights and lessons from publicly funded R&D – this is all the more important in conditions of austerity. Allied with this, there needs to be a broader endeavour to make publicly funded digital content more easily discoverable via a Digital Public Space – a dedicated and freely accessible digital 'cultural library' of all our digitised cultural achievements.

3.5
Prioritising the role of culture and creativity in generating a sense of identity, place and community across the country

Goal 5:
A vibrant creative life at local and regional levels that reflects and enriches community expressions of identity, creativity and culture across the UK.

The Cultural and Creative Industries have a vital role to play in successful place shaping. Until now the emphasis of policymakers has primarily been on the positive economic influences of a rejuvenated cultural offer across our towns and cities. Whilst this is of vital importance, the Cultural and Creative Industries also deliver crucial benefits in building and forming local identity and creative aspiration and shaping international views of the different regions and cities of the UK.

The Commission welcomes Art Council England's 'Creative People and Places' initiative which is exploring how best to generate cultural demand and aspirations in areas of the country with very poor profiles in terms of cultural participation.[10] There is a general need for public funders to more proactively fashion investment strategies and interventions that are more responsive to local needs and demand, to talent from across the country, and to natural organic growth in the vibrancy of our towns and cities. This will require more assertive efforts to bring together new models of public and private partnership on a regional and city basis.

Cultural organisations need to do a better job at coming together locally to share resources, devise partnerships that will unlock financial savings and generate income benefits, and join forces in making their case – What Next? shows the potential.[11] They should invest time, effort and self-criticism in a deeper understanding of the economic, social and environmental challenges facing their local communities so they are able to make an intelligent and realistic arts-based contribution to solving those problems.

The analyses and recommendations in this report are the product of broader in-depth research. Further resources, including briefing documents, responses to our open call for evidence and interviews, can be found on the Warwick Commission website: http://www2.warwick.ac.uk/research/warwickcommission/futureculture

Section 1 Endnotes

1 DCMS (2015) *Creative Industries Economic Estimates, January 2015, Statistical Release*. London: Department for Culture Media and Sport. Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/394668/Creative_Industries_Economic_Estimates_-_January_2015.pdf.

2 Nesta (2013) *Manifesto for the Creative Economy*. London: Nesta. Available from: http://www.Nesta.org.uk/publications/manifesto-creative-economy.

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4 Creative Industries Council (2014) **Create UK: Creative Industries Strategy*. London: Creative Industries Council UK. Available from: http://www.thecreativeindustries.co.uk/uk-creative-overview/facts-and-figures/new-create-uk-strategy.

5 See: http://www.ahrc.ac.uk/Funded-Research/Funded-themes-and-programmes/Cultural-Value-Project/Pages/default.aspx.

6 Nesta (2014) *The New Art of Finance: Making money work harder for the arts*. London: Nesta. Available from: http://www.Nesta.org.uk/sites/default/files/the_new_art_of_finance_wv.pdf.

7 See: http://www.hlf.org.uk/file/12461/download?token=PF4QgVKqnbGCwia07gR9j8gWpFatNYXwtlfBUkQbn7k.

8 See: http://www.creativeindustriesfederation.com/.

9 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.

10 See: http://www.artscouncil.org.uk/funding/apply-funding/funding-programmes/creative-people-and-plArts Council Englands-fund/.

11 See: http://www.whatnextculture.co.uk/.

Goal 1:
A Cultural and Creative Industries Ecosystem generating stronger cultural and economic growth and opportunity for all citizens and communities.

2

Ecosystem

2.1 Context

The Cultural and Creative Industries make a significant contribution to the British economy and are the fastest growing industry in the UK. The Gross Value Added (GVA) of the sector was estimated by DCMS at a global £76.9bn in 2013, representing 5.0% of the UK economy.[12]

The Cultural and Creative Industries – described by government as the Creative Industries – are *'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'*.[13] Within this broad grouping there are creative industries such as Software, Advertising and Publishing that are extraordinarily successful both in economic terms and as examples of the creativity and entrepreneurship that characterise the UK's cultural and creative tradition.[14]

The United Nations define the UK's creative industries sector as being at the crossroads between the arts, business and technology.[15] The Commission's use of the term Cultural and Creative Industries seeks to encompass and emphasise this positioning. As well as specialising in creative activity, all of these industries shape reflect and develop our culture and embody our creative and consumer responses to changing trends and technological advances. As a result, our lives are constantly being enriched and influenced by Architecture, Design, Fashion, Film and TV and the other creative industries.[16] The Visual and Performing Arts mirror and significantly contribute to and challenge our cultural progress and identity.

£76.9 billion

DCMS's 2013 estimate of global Gross Value Added (GVA) of the Cultural and Creative Industries.[12]

Within the Cultural and Creative Industries, sub-sectors such as Music, Performing and Visual Arts, Film and TV, and Museums, Libraries and Galleries are significant employers and contribute to the UK's reputation as a world leader in standards of cultural production and, more widely, to making the UK attractive internationally to tourists, students and investors.[17]

These sub-sectors have also traditionally relied on public investment to survive and flourish. In a time of austerity and diminishing public resources, it is important to stress the interdependence of the economically successful parts of the creative industries with these publicly supported sub-sectors. The Commission is particularly keen to raise awareness of the extent to which the success of the Cultural and Creative Industries as a whole is dependent on the talent development, R&D, networks and career opportunities that have been supported by public investment.

In this context, the proportion of public spending on the arts, culture and heritage is infinitesimal compared to their GVA and their contribution to the economic success of the broader Cultural and Creative Industries. The direct spend on arts, culture, museums and libraries, for instance, is only around 0.3% of the total public spend.[18]

It is therefore a grave mistake to think that any further reductions in levels of public investment will only affect the reach and impact of the arts, culture and heritage. They will also impact negatively on the quality and diversity of the content and talent that is the wellspring of the UK's Cultural and Creative Industries Ecosystem.

In a time of austerity and diminishing public resources, it is important to stress the interdependence of the economically successful parts of the creative industries with these publicly supported sub-sectors.

2.1.1 The Creative and Cultural Industries Ecosystem

The Warwick Commission uses the Ecosystem metaphor to capture the connections between the publicly funded and commercial successes of the Cultural and Creative Industries. We use it to connect our creative and cultural success to the shared national cultural identity and foundations that continue to produce world-class talent. The creativity and cultural vibrancy within our shared UK identity also nurtures brilliance in design, engineering and enterprise more generally.

The Ecosystem describes the interconnectedness of the Cultural and Creative Industries in terms of the flow of ideas, talent and investment from public and private sources that characterises them. Many creative organisations are small business-to-business operations feeding the needs of other organisations within the Cultural and Creative Industries and dependent on the success of the Ecosystem as an integrated whole to survive and flourish.

The flow between the commercial and cultural ends of the Ecosystem generates economic value, audiences and consumers.[19] This is why we so often see artists and creative businesses working in the same locations.[20] It is also important to note that Britain's cultural and creative ecosystem nurtures relationships with other ecosystems on a global scale via interchange with other countries' cultural and creative sectors, from international film co-productions to the blossoming Biennales across the world.

The Ecosystem thrives because it exists within a cultural tradition that is constantly evolving and which reflects our diversity and values, a cultural tradition that nurtures critical, curious, creative, tolerant and inventive people. Danny Boyle made this visible in the opening ceremony of the 2012 London Olympics, most memorably in the section which layered Mike Oldfield's iconic *Tubular Bells* soundtrack with the NHS, contemporary dance, J.M. Barrie and *Peter Pan*, J.K Rowling and *Harry Potter*, and other significant works of British literature. Other sections of the ceremony, including the arrival of the 1948 Windrush and the performance of Grime artist Dizzee Rascal, demonstrated that our cultural identity is made up of the ideas, traditions and people that have come to the UK from across the world and which, because of our curiosity and openness, have become part of who we are as a richly diverse and multicultural society.

Diversity of creative talent and participation is essential to the expressive richness and the economic and social prosperity of the ecosystem. It is a mistake to think that the under-representation of Black and Minority Ethnic (BAME) individuals, women, deaf and disabled people and low-income groups in the Cultural and Creative Industries is purely a social justice issue. It is also very bad for business, diminishing the breadth and depth of creative perspectives, audiences and consumers.[21] A lack of diversity and under-representation also damages our international reputation and trust in the UK as a diverse and tolerant society.[22]

Viewed from the outside, the UK is seen as being creative, innovative, confident and entrepreneurial and is regarded as a world leader in the arts. According to a recent British Council report, *As Others See Us*, culture and the arts play a central role in attracting visitors and investment from overseas and rank among the top three things British people should be proud of.[23] In the 2014 Anholt-GfK Roper Nation Brands Index™, the UK ranked third overall for its perceived wealth in contemporary culture – just after the United States and France, but with very similar absolute scores; it has ranked in third or fourth place every year since 2008.[24] But we cannot afford to be complacent. Unless the challenges to the Cultural and Creative Industries identified in the **Create UK* strategy and by this report are recognised and addressed, we will not maintain this high international regard or be able to compete artistically and commercially with other world players.

Diversity of creative talent and participation is essential to the expressive richness and the economic and social prosperity of the ecosystem. It is a mistake to think that the under-representation of Black and Minority Ethnic (BAME) individuals, women, deaf and disabled people and low-income groups in the Cultural and Creative Industries is purely a social justice issue.

£2.9 billion

The total economic impact of the UK film industry on UK GDP in 2012.

2.1.2
UK film as an exemplar of the Cultural and Creative Industries Ecosystem in operation

The UK film industry offers a lens to observe the Cultural and Creative Industries Ecosystem in action and is one of its greatest success stories. In 2013, British films earned a worldwide gross of $4.1 billion, which amounted to 11% of global box office[25] and 'Film, TV, video, radio and photography' was the group which had the third largest percentage increase in employment in the Creative Economy between 2011 and 2013 (11.8% or 27,000 jobs).[26]

Strategies across the film industry from funding and finance to education and training recognise the interrelatedness and interdependence of the ecosystem's constituent elements. By combining successes with blockbuster hits with culturally significant but less profitable independent cinema, the industry is positioned on a creative-cultural continuum and recognises that breadth and depth of choice make British film attractive to audiences.[27]

The film sector draws on creative, artistic and technical skills from across the Cultural and Creative Industries (performing arts, design, crafts, gaming technologies, publishing, directors, etc.), encouraging the flow of talent, skills and financial resources across the ecosystem. This 'multiplier effect'[28] further impacts on the broader economy, as film production requires location hire, transport, accommodation, catering, etc., thereby contributing to the UK's GDP as a whole and potentially bringing investment to the regions. According to a recent study, the total economic impact of the UK film industry contributed over £2.9 billion to UK GDP in 2012.[29] The film industry is itself fed by other sectors within the Cultural and Creative Industries Ecosystem both in the UK and internationally. The top 20 grossing British productions include numerous book adaptations, such as the *Harry Potter* series, the three most recent *James Bond* films, *Bridget Jones's Diary*, *Les Misérables* and *Charlie and the Chocolate Factory*. The combined gross for these films is £773 million from British audiences alone.[30]

Strategies across the film industry from funding and finance to education and training recognise the interrelatedness and interdependence of the ecosystem's constituent elements.

2.2 Challenges

The UK film industry gives a concrete example of an internal ecosystem but it also reveals challenges, which are common across the Cultural and Creative Industries. The Commission has been particularly concerned to understand and evidence these challenges in the sections of the report that follow and to make recommendations which will have the biggest impact on the Cultural and Creative Industries Ecosystem as a whole.

The Cultural and Creative Industries Ecosystem as a whole faces a governance reality that is over-siloed and disconnected in terms of policy making, strategy and financing.

2.2.1 The policy making challenge

It is significant that, since the demise of the UK Film Council, the BFI deals with both cultural and commercial film activity. This has resulted in an integrated approach that combines private and public investments from Lottery funding and tax incentives,[31] commercial and non-profit interests, and has secured talent pathways into the industry as well as educating and enthusing potential audiences.

However, the Cultural and Creative Industries Ecosystem as a whole faces a governance reality that is over-siloed and disconnected in terms of policy making, strategy and financing. This is particularly true for the publicly funded arts, culture and heritage sector. As a result, at a time of austerity and significant cuts in public funding, their future viability in terms of talent development and audience/consumer generation is disproportionately negatively influenced. As a consequence the whole Ecosystem is affected by fluctuations and piecemeal public investment in education, talent development, workforce diversity, R&D, innovation and infrastructure. The vulnerability of public investment represents a concern for the Cultural and Creative Industries as a whole.[32]

As far as the Commission can establish, the Treasury has come closest to developing a consistent investment strategy for the Cultural and Creative Industries Ecosystem through the introduction of tax incentives not just for film and high-end TV but also for video games and theatre, children's TV and orchestras. The BIS and DCMS sponsored Creative Industries Council is also a significant step forward but requires formal support and common strategy input from other departmental sources, particularly Department for Education, Department of Health, DfE, Department for Communities and Local Government (DCLG) and HM Treasury.

The vulnerability of public investment represents a concern for the Cultural and Creative Industries as a whole.[32]

2.2.2
The data challenge

The Creative and Cultural Industries need a more rigorous and systematic analysis of the returns from the critical flow of investment from public and private sources, the migration of talent and Intellectual Property and the impact of R&D across the Ecosystem to underpin the significance of public investment in general, and the contribution of the publicly funded arts, culture and heritage in particular. This data is required both to ensure that the effects and multipliers of public investment are understood and to provide the levels of analysis required to attract private investment.

The Creative and Cultural Industries have a complex diversity of business and investment models which present challenges to more orthodox forms of financing, as the **Create UK* report demonstrates. A particular challenge for the publicly funded arts, culture and heritage sector is how to determine metrics for evaluating the impact of their artistic, cultural and social value creation in order to be more accountable to public investors and to attract private investors in particular.[33]

2.2.3
The investment challenge

The UK is in a period of embedded austerity that has reduced levels of public spending and investment in the Cultural and Creative Industries, particularly in the arts, culture and heritage sector, and this trajectory will continue. There are new investment and market opportunities and the Ecosystem is adapting to this new environment through exploring innovative business models and investment sources, including social enterprise financing.[34] This is complex and pioneering territory particularly for creative Small and Medium Enterprises (SMEs) and many arts, culture and heritage organisations that will need to upskill or work in new partnerships with larger businesses and organisations to take advantage of the new investment landscape. There are concerns that the fragmentation of government policy and strategy means that public spending is not being maximised and used to leverage additional sources of investment. Whilst tax incentives are a very welcome boost, there are also concerns that the UK is not investing enough in building a sustainable infrastructure for the Cultural and Creative Industries Ecosystem.

The UK is in a period of embedded austerity that has reduced levels of public spending and investment in the Cultural and Creative Industries, particularly in the arts, culture and heritage sector, and this trajectory will continue.

There are concerns that the fragmentation of government policy and strategy means that public spending is not being maximised and used to leverage additional sources of investment.

The arts, culture and heritage sector is beginning to rise to this challenge and the boundaries between exclusively commercial and non-profit activity are eroding. A few publicly funded organisations are diversifying their investment portfolios and content in order to boost their economic viability and offer commercially and creatively rewarding content.

The Commission's priority has been to support new mixed investment opportunities and more effective use of existing resources rather than to expect more government money in the form of grants and subsidies. But there are significant threats to current levels of public investment in the Cultural and Creative Industries and we are not complacent about the challenges ahead. We remain particularly concerned at the impact of austerity measures on local and regional cultural activity and infrastructure.

The Commission believes that we are likely to see a shift in the coming years from increasing direct public funding to the Cultural and Creative Industries towards brokering and facilitating mixed investments from private sources and the social economy. These initiatives include Cultural and Creative Industries' access to the Enterprise Investment Scheme,[35] Venture Capital Trusts,[36] and the new Seed Enterprise Investment Scheme.[37] Additionally, as the social economy matures, there are new opportunities to maximise Peer to Peer Investment, Equity Crowd Funding and other alternative sources. The social economy may be of particular value to local government in maximising new investment models for creative and cultural activity.

Nesta has recently produced *The New Art of Finance*, an analysis of new finance models and case studies that are responsive to this changing landscape.[38] The proposed 'Arts Impact Fund', supported by Nesta, Arts Council England and the Esmée Fairbairn Foundation, is an exciting initiative designed to demonstrate the relevance and viability of impact-focused debt funding for organisations that can demonstrate artistic and social impact and financial sustainability. Creative United's 'Creative Industries Finance' initiative is now offering seed funding and business advice to creative start-ups. Both these models are key drivers for creative and cultural growth in an age of austerity. If they are to be successful, they must attract significant resources from public and private investors in order to have any real impact on the Cultural and Creative Industries.

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The social economy may be of particular value to local government in maximising new investment models for creative and cultural activity.

2.3 Recommendations

2.3.1 Joined-up policy making

The government departments for Culture, Media and Sport (DCMS), Business, Innovation & Skills (BIS), and Education (DfE) should produce a national plan for the publicly funded arts, culture and heritage sector that complements the Creative Industries Council's **Create UK* industrial strategy. The national plan must focus on an holistic ecosystem approach to: securing the investment needed for sustainable creative and economic success; diversifying the workforce at all levels sustained by an effective pipeline of talent and skills; and building demand for full participation in a cultural life that celebrates the UK's diversity and artistic richness.

1. There needs to be a joined-up approach to culture, heritage and creativity across BIS, DCMS, DfE, DCLG and the Department for Environment, Food and Rural Affairs (DEFRA),[43] together with other key delivery and investment organisations, in order to increase and diversify the flow of investment, talent and ideas from existing and new sources.

2. Skills and talent development for the Cultural and Creative Industries should be rationalised and the two relevant Sector Skills Councils – Creative Skillset[39] and Cultural and Creative Skills[40] – merged into one organisation representing the training needs of the wider Ecosystem. This rationalisation must build on the excellent track record of both organisations and produce a nationally and regionally implemented plan for ensuring that talent and skills are developed in a way that sustains the whole ecosystem, with clear career pathways and an emphasis on diversifying the workforce.

3. The Cultural and Creative Industries must join together and play a key role in supporting the Creative Industries Council and the new Creative Industries Federation. The Commission welcomes the emergence of both bodies with their potential to connect the diverse parts of the Ecosystem and to work jointly towards industry as well as government solutions to the many challenges that need to be addressed. Both organisations are key partners in achieving success in a joined-up, ecosystem approach.

4. The Commission was concerned to discover that no in-depth statistical analysis of cultural and creative workforce data in terms of socio-economic backgrounds has been published, even though the data are available through the Office for National Statistics data-sources. This must be rectified by industries, funding bodies, academics and relevant Government departments in order that a robust set of data and rigorous analysis can contribute to achieving the goal of a representative workforce and identify the obstacles that currently stand in the way of this goal.

5. Higher Education Institutions (HEIs), supported by the Economic and Social Research Council (ESRC)[41] and the Arts and Humanities Research Council (AHRC),[42] should initiate and support longitudinal data collection and analysis that will track the evolution of the Cultural and Creative Industries over time and allow policies to be rigorously evaluated. They should also support a major effort to explore big data sets, including social media data, to provide complementary evidence on cultural participation based on observed behaviour. The three-year Digital Culture longitudinal survey of how arts and cultural institutions in England are engaging with digital technology, led by the Digital R&D Fund for the Arts, may be one possible model.[43]

6. It is essential that DCMS's Taking Part survey is maintained as a respected and robust data set on reported cultural participation to drive decision making at all levels.[44]

7. DCMS needs to convene a forum of interested parties, including HEIs and other stakeholders with public research capacities, to 'join the dots' in the evidence base to lead strategy and policy and better inform the Cultural and Creative Industries and their potential investors. For the flow of data across the ecosystem to be effective, it needs to be rigorous, shared and open source.

2.3.2 Scaling investment

To help secure greater investment, DCMS, supported by the Creative Industries Council, should work with public and private investors and cultural leaders to deliver a new investment model for the publicly funded elements of the Cultural and Creative Industries that will maximise their commercial potential. This model should attract private and public investors and stimulate a greater degree of commercial return and benefit to the originating individual or organisation.

1. Publicly funded organisations must be supported and incentivised to develop the business skills and enterprise needed to access additional funding streams and maximise their commercial potential. This includes board members and senior executives having commercial knowledge and access to appropriate training and development.
2. Public and private funders should stand ready to scale up investment in initiatives like the proposed Nesta – Arts Council England – Esmée Fairburn social investment fund for the arts and Creative United's 'Creative Industries Finance' initiative,[45] if the pilots prove successful.
3. Working with the Creative Industries Federation and the Creative Industries Council, DCMS and BIS should hold an annual investment summit of the relevant businesses and organisations they invest in to share best practice in delivering economic, artistic and social value, including international value for the UK, and to identify wide-ranging investment opportunities.
4. A 'board bank' should be set up by the Creative Industries Council and Creative Industries Federation that creates a pool of potential board members with commercial knowledge to join Cultural and Creative Industries organisations in receipt of public funding.

2.3.3 Innovating for growth

To accelerate innovation and growth the cultural sector should have access to targeted public investment in Research and Development activities aimed at innovative content production, audience engagement, financial models, and at exploring ways of creating new forms of cultural and social value. Publicly supported organisations should be expected to share the insights and lessons from publicly funded R&D – this is all the more important in conditions of austerity.

1. DCMS and BIS should allocate a specific share of their budgets towards funding R&D by organisations looking to innovate in their audience reach, operating model and value creation.
2. The results of publicly supported R&D should be made available to all, based on the experience of the Digital R&D Funds in England, Scotland and Wales, with any technology developed as part of this made open source where possible.
3. Funders should explore ways of supporting the capacity of Cultural and Creative Industries organisations to undertake R&D, including initiatives aimed at board level.

Section 2 Endnotes

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DCMS funding for museums, galleries and the British Library is £472m: https://www.gov.uk/government/publications/dcms-annual-report-and-accounts-2013-14.

Together this equals £2.5bn which is 0.3% of the total public spend of £714bn: Public Expenditure Statistical Analysis https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/330717/PESA_2014_-_print.pdf.

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http://www.hmrc.gov.uk/guidance/vct.htm.

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Goal 2:
Production and consumption of culture and creativity should be enjoyed by the whole population and deliver the entitlement of all to a rich cultural and expressive life.

3

Diversity and participation

3.1 Context

Despite the excellent work and high levels of commitment to change in the Cultural and Creative Industries, low cultural and social diversity amongst audiences, consumers and the creative workforce remains a key challenge for future success. We are particularly concerned that publicly funded arts, culture and heritage, supported by tax and lottery revenues, are predominantly accessed by an unnecessarily narrow social, economic, ethnic and educated demographic that is not fully representative of the UK's population.

There are also major concerns about the ability of local communities and regions to sustain levels of participation and invest in more diverse and locally representative arts, culture and heritage and to compete with the metro-centric pull on the nation's creative talent and activity. These issues are analysed in the final section of this report: *Making the local matter*.

Traditionally, concerns over broadening participation have concentrated on tackling the social stratification of cultural and creative consumption with varying degrees of success. However, the Commission is keen to emphasise that equal attention needs to be placed on the making of culture and creative expression, whether in the context of the Cultural and Creative Industries or as amateur activity.

We face a situation in which the voices, experiences and talents of the UK's population as a whole are not being expressed, represented or developed within the Cultural and Creative Industries. This has both social and economic consequences. It means that too few of the population have access to as rich a culturally expressive life as might otherwise be open to them. At the same time, limited access to the means of creative expression, especially at professional levels, hinders the broadening of the potential market for, as well as the supply of, cultural and creative experiences, and this diminishes the potential for cultural and creative growth.

Of course the challenges of diversity and participation in the Cultural and Creative Industries mirror endemic features of our broader society. Widening participation and diversifying the workforce will not 'solve' the problem of a socially and economically stratified society. However, the Cultural and Creative Industries, together with education, play a crucial role in building an ecosystem that is representative and expressive of all sections of society. In this respect, these challenges need urgent attention because they damage the integrity, reputation and economic potential of the UK.

We face a situation in which the voices, experiences and talents of the UK's population as a whole are not being expressed, represented or developed within the Cultural and Creative Industries.

3.2 Challenges

3.2.1 Engagement and participation

In 2014 Britain, high socio-economic background, university-level educational attainment and a professional occupation are still the most reliable predictors of high levels of engagement and participation in a wide range of cultural activities, with this correlation being especially marked for those activities that attract significant public funding.[46]

The data presented below refer to the visual arts, music and theatre activity that is supported by Arts Council England. However, it is important to note that Arts Council funding is not just aimed at audiences but goes towards supporting artists, production costs, educational activity, marketing and considerable outreach activities to schools, communities and prisons for instance. And this funding is essential for increasing participation and promoting diversity.

A new segmentation of cultural consumption based on Taking Part data shows that the two most highly culturally engaged groups account for only 15% of the general population and tend to be of higher socio-economic status.

The wealthiest, better educated and least ethnically diverse 8% of the population forms the most culturally active segment of all: between 2012 and 2015 they accounted (in the most conservative estimate possible) for at least 28% of live attendance to theatre, thus benefiting directly from an estimated £85 per head of Arts Council England funding to theatre.

The same 8% of the population also accounted for 44% of attendances to live music, benefiting from £94 per head of Arts Council music funding.

For the visual arts, this highly engaged minority accounted for 28% of visits and £37 per head of public funding.[47]

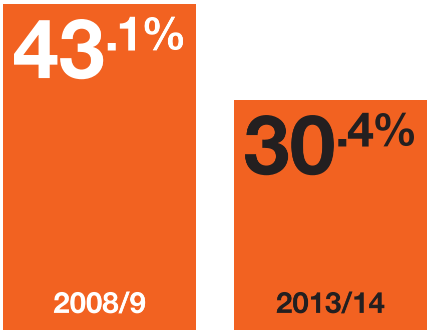
The 'participation gap' they highlight, which cultural organisations are endeavouring to close, is not caused by a lack of demand among the public for cultural and creative expression.[49]

Ethnicity is also a significant factor in participation: analysis of Taking Part data suggests that, despite overall increases in participation among the BAME population between 2005/6 and 2012/3, the gap in participation between the white and BAME population is widening. In the 12 months prior to being interviewed, adults from BAME groups, compared with the white group, were less likely to have visited a heritage site (59.8% compared to 74.1%) or have engaged with the arts broadly defined (70.4% compared to 78.5%).[48]

These troubling statistics obscure the deeper challenge facing the publicly funded arts, cultural and heritage sectors, namely that the 'participation gap' they highlight, which cultural organisations are endeavouring to close, is not caused by a lack of demand among the public for cultural and creative expression.[49]

For example, some of the Cultural and Creative Industries are remarkably successful at engaging ever larger and more diverse audiences. BFI data shows that in 2012 cinema-going was the largest single gross revenue source for the British film industry and that UK films appealed across all demographic groups: at least one British film was among the top five and earned an above-average audience across all age, gender and social groups.[50]

TV remains a key feature of most people's everyday cultural life: the BBC's weekly average reach (that is, how many people enjoy the BBC's programme and services and for how long) across all its channels/media is 96.5% of the British population, who score their 'general impression' of the broadcaster at 7 out of 10.[51]



5-10 year olds who engaged in dance activities.

Low engagement is more the effect of a mismatch between the public's taste and the publicly funded cultural offer.

A passion for music is similarly widespread: A survey carried out by Ipsos MORI for Deloitte in 2014 found that two thirds of their 2,000 respondents listened to the radio at least once a week, and that for 70% of the adults among them, music was important. This figure was even higher amongst young people: 84% of respondents under the age of 25 declared that they saw music as an important part of their lives.[52]

All of which suggests that low engagement is more the effect of a mismatch between the public's taste and the publicly funded cultural offer – posing a challenge of relevance as well as accessibility – combined with the narrowing of cultural education in schools and, consequently, of the skills and familiarity that might lead to the broadening of tastes.

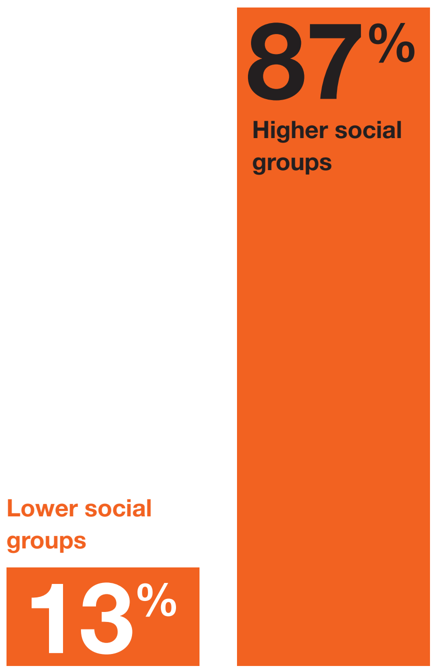
Even ambitious measures such as the institution of free entry to national museums, one of the country's most internationally visible and admired policies for cultural access, has failed in its declared mission to make Britain's flagship museums more inclusive. Analysis of annual performance indicators of DCMS-funded museums reveals that visits by UK residents fell by 3% over the period 2008/09 to 2011/12 while visits from UK residents from lower social groups fell even more, by 12%. The higher social groups accounted for 87% of all museums visits, the lower social groups for only 13%.[53]

Libraries, which are the only area of statutory cultural spending for local authorities, have witnessed a significant decrease in participation: Taking Part data reveals that in the year 2013/14, 35% of adults interviewed in England had used a library in the previous twelve months, a significant decrease from 48% in 2005/06 and a significant and progressive decrease from 39% in 2011/12 and 37% in 2012/13.[54] This trend can in part be explained with the closure of possibly as many as 272 libraries across the country in between 2010 and 2013[55] as a result of austerity-driven cuts to local authorities' budgets.

Yet with all cultural services facing the prospect of further cuts in the coming years, these data poignantly signal a dangerous shift in patterns of engagement. The Commission welcomes the recent *Independent Library Report* with its recommendations to boost engagement with the digital as well as the traditional resources offered by our libraries.[56]

There are also worrying trends towards a decrease in participation by children in most cultural activities, documented by the Taking Part data: between the years 2008/9 and 2013/14, the proportion of 5-10 year olds who engaged in dance activities dropped from 43.1% to 30.4%; participation in music activities dropped from 55.3% to 37.2%; participation in theatre and drama activities dropped from 47.1% to 32.1%; arts and crafts activities dropped from 80% participation to 75.7%.

The only significant increase in participation was in the area of film or video activities, which grew from 49% to 71.1%, confirming that digital technologies offer a potential for enhancing participation and developing new ideas and forms of personal cultural expression that ought to be capitalised upon.[57]



Visits to museums.

3.2.2
Creation, voice and the creative workforce

Participation in the creation of culture is as much a concern as the question of access to its consumption. The diversity of the creative workforce in Britain has progressively contracted over the past five years in relation to gender, ethnicity and disability, as data collected by the relevant Sector Skills Councils show.[58] Access to the opportunity for creative self-expression is currently socially stratified and restricted for many women, ethnic minorities and disabled people. As we have noted, this is bad for business as well as for society.

This is compounded by the reliance on unpaid or low-paid internships, and the problem of unequal pay (or lack of pay), which includes and goes beyond unpaid internships. Research commissioned by a-n, The Artists Information Company to support their 'paying artists campaign' revealed that in the past three years, 71% of artists had received no fee for exhibiting in publicly-funded galleries.[59]

The diversity of the creative workforce in Britain has progressively contracted over the past five years in relation to gender, ethnicity and disability.

BAME workers represent 6% of workers in Design; 9.1% in Film, TV and radio; 6.7% in Music and Performing and Visual Arts, compared to 14.1% of the overall population in England and Wales and 40% in London where there is a high concentration of Cultural and Creative Industries.[63]

In England, 12% of the creative and cultural workforce is classified as disabled under the Disability Discrimination Act (DDA) definition,[64] compared to 18% of the general workforce.[65] Only 1.6 per cent of artistic staff, 2.8% of managers and 3.9% of Board Members within the 2012–15 National Portfolio Organisations and Major partner museums consider themselves disabled.[66]

The *Sex and Power 2014* report revealed that TV broadcasting had 0% women representation among its chairs and CEOs and only 10% of the national theatres and 9.3% of the museums surveyed were chaired by a woman.[60]

Fewer than one in ten managers within the 2012–15 Arts Council England National Portfolio Organisations and major partner museums are from a BAME background.[61]

Only 1.6 per cent of artistic staff, 2.8% of managers and 3.9% of Board Members within 2012–15 National Portfolio Organisations and Major Partner Museums consider themselves disabled,[62] compared to 18% in the general workforce.

Furthermore, the cultural and creative workforce has suffered from the consequences of cuts to welfare provision as part of the austerity measures aimed at tackling the economic deficit, and this makes facing the challenge of participation harder still. For example, changes to disability-related employment and welfare policies, such as Disability Living Allowance,[67] Independent Living Fund[68] and Access to Work,[69] compounded by changes to housing and other benefits, are going to make it especially hard for disabled workers to remain and will result in reduced diversity in the Cultural and Creative Industries Ecosystem.[70]

A report by the Work and Pensions Select Committee on the Access to Work programme published in December 2014 confirms these concerns. The report acknowledges that the scheme is currently helping fewer people than in the past and only a fraction of those whom it is supposed to benefit. In some cases, the programme is, in fact, having a negative impact on employability. For example, the report highlights how the excessively rigid application of regulations and caps on hourly rates have threatened the employability of deaf British Sign Language users by drastically reducing access to crucial sign language translation.[71]

The stark reality is that the possibility to express oneself artistically and creatively at a professional level is curtailed by social background and personal characteristics[72] to an unacceptable degree, as many campaigns and media declarations by high-profile members of the British cultural and creative community have pointed out. This situation raises serious questions about the extent to which the cultural and creative sector fulfils the requirements of the Equality Act 2010.[73]

3.2.3 Participation, volunteering and creative amateurs

There is mounting evidence that everyday forms of cultural participation and creation (including activities that people carry out in their homes) are of great importance. They are key to leading a rich and fulfilling life as well as crucial for the financial prosperity of the industries that belong to the Cultural and Creative Ecosystem.[74]

DCMS data show that as many as 9.4 million people in England take part in a diverse range of arts and cultural activities where they live.

There are 49,140 voluntary and amateur arts groups across England, with a total of 5.9 million members, while a further 3.5 million people volunteer as extras or helpers.

According to *Our Creative Talent*, a report published by DCMS in 2008 (to date still the most comprehensive set of statistics on voluntary arts activity), there are 49,140 voluntary and amateur arts groups across England, with a total of 5.9 million members, while a further 3.5 million people volunteer as extras or helpers. DCMS concludes that this amounts to a total of 9.4 million people taking part in a diverse range of arts and cultural activities in their localities.[75] Cultural participation of this kind is on the increase more noticeably among young people and some are even able to develop their amateur activities into paid work.[76]

In this context of flourishing voluntary arts, the Commission welcomes the launch of 'Our Cultural Commons' – an important joint initiative by Voluntary Arts and Arts Development, which will explore new ways to sustain and develop the diverse creative lives of our communities.[77] By gathering evidence of existing local collaborative practice and offering a space for discussion of potential solutions to the problems facing local cultural infrastructure, the two organisations hope to support and develop the 'cultural commons' in local communities.

2%

On average, only 2% of amateur group participants are from a BAME background.

The trend towards increased participation and volunteering is to be celebrated, yet it also displays some of the more concerning features of engagement. DCMS's *Our Creative Talent* also shows that, in England, on average, only 2% of amateur group participants are from a BAME background, with very little variance across the sector.[78] Across the voluntary and amateur art sector, an average of 3% of participants would consider themselves as having a disability, which is significantly lower than the proportion of the wider population that is disabled (which is around 18% of the total population in England).[79] Craft accounts for 7% of disabled participants, and literature, visual arts and media 6%. However, festivals have on average only 1% of disabled volunteer participants.[80]

Similarly, data on the socio-economic background of participants in voluntary and amateur creative activities reveals that they are, in large part, employed (42%); 29% of them are retired, and 23% are full-time students. Only 6% of amateur participants are unemployed, and therefore likely to face economic difficulties: once again participation correlates with a more comfortable socio-economic background.

1%

Festivals have on average only 1% of disabled volunteer participants.[80]

3.2.4
Building on initiatives in the publicly funded sector

Widening cultural participation and engagement in the Cultural and Creative Industries is recognised as an urgent priority for policy making. Unusually for policy debates, this is also a point on which there seems to be a broad political consensus.[81]

The Commission welcomes Arts Council England's renewed emphasis of the importance of the Creative Case for Diversity.[82] We also support the work of the TV industries' Creative Diversity Network and new commitments by BBC, ITV, Channel 4 and Sky, and the BFI's triple tick diversity investment criteria.[83] But the harsh truth is that the arts, cultural and heritage sectors have yet to forge a truly concerted response to the challenge of embedding the values and practice of relevance and openness at the core of their organisations.

This is particularly sobering given the amount of time and energy that has been devoted to these issues by cultural and creative organisations, public bodies, national government departments and local authorities.

The challenge we face, then, is how to effectively ensure that all enjoy the opportunity to develop their particular cultural preferences and experience genuine access to the means to produce and consume the creative forms they choose to engage with, having mastered the skills necessary for access to a diverse range of cultural choices.

Based on the evidence reviewed, the Commission believes that a strategic shift is needed from a funding and policy infrastructure that focuses on the support of the supply of cultural experiences to an approach that addresses unrepresentative levels of diversity and participation as an equally important objective of policy and strategic development for the arts, culture and heritage.[84]

The value of everyday cultural activities needs to be more fully acknowledged and supported. The amateur and voluntary sector may be of pivotal importance in spearheading a creative participation revolution.

Technology will be key. New initiatives such as the Creative Skillset HiiVE app[85] are modelling how to bring creative people and projects together and encourage collaboration and routes to growth of ideas. The potential for digital technologies to support increased diversity in supply and demand is explored in further depth in the chapter on *Digital culture*.

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3.3 Recommendations

3.3.1 Building and measuring participation

The publicly funded Cultural and Creative Industries should focus on increasing the breadth of their reach and the depth in public support for their work in exchange for the levels of public investment from which they benefit. DCMS should incentivise a more demand-driven strategy that responds to a wider range of audiences and their values and offers the choice and challenge of new and unexpected creative experiences.

1. Cultural organisations and projects in receipt of public funding, including from the Arts Council England, British Film Institute and the Heritage Lottery Fund, should be required to provide a triple bottom line account of their economic viability, artistic/creative quality and their delivery of social value (in terms of reaching wider audiences and being representative of British contemporary society), with the expectation that they have successfully achieved an appropriately balanced score card.
2. DCMS, the Treasury and BIS should work with the Creative Industries Federation, the Creative Industries Council and Arts Council England to determine agreed metrics for measuring and moderating the triple bottom line according to the different business models in the Cultural and Creative Industries.

3.3.2 Diverse to the core

Both private and publicly funded businesses and organisations should be incentivised by DCMS, BIS and the Treasury to work towards a diverse and representative workforce for economic as well as social and creative reasons.

1. The Cultural and Creative Industries should lead the national diversity agenda through example by ensuring that boards, trustees and funding councils are widely representative of the population.
2. Chairs of the boards of publicly funded cultural organisations need to share best participation and diversity practices and must be held to account by the public. Organisations that depend on more than 25% public funding should be required to have approved training in diversity and participation development for their Chairs, and to provide targeted plans to build this expertise on their boards and in their executive team. Arts Council England has already made a start through its funding of the Clore Duffield Foundation's Board Development Programme[86] and more of these opportunities are needed.
3. The Commission is pleased to note the efforts made by BBC, ITV and Channel 4 to implement the recommendations of the Creative Diversity Network 'to take measurable steps to improve diversity in the TV industry' by ring-fencing production budgets to incentivise diversity and representation in the creation and content of work.[87] It also welcomes the BFI model, which makes public investment dependent on diversity on and off-screen and creating opportunities and promoting social mobility. These initiatives should be considered and matched by the publicly funded arts, culture and heritage sector.

3.3.3 Celebrating everyday arts and cultural participation

A popular campaign should be mounted to celebrate Britain's arts in order to make our cultural landscape more visible to the public and to reconnect the public with culture at national and local levels.

1. The BBC, together with other cultural networks such as What Next? and Voluntary Arts, should launch a high-profile campaign aimed at raising the profile of everyday arts and cultural participation across the UK.
2. This campaign should be accompanied by an interactive and crowd-sourced online cultural mapping project. This initiative would encourage individuals and organisations to use digital and web tools to celebrate and mark the distinctiveness of local cultural assets, voluntary activities and everyday creativity that can be found in the locality where they live.
3. The project should be complemented by a research element, based on a rigorous methodology to collect geo-demographic data and key measurable variables such as numbers of museums, libraries, range of assets and types of activities the public chooses to map. The data should be open source so that researchers can analyse it, thus contributing to the growing body of research into everyday cultural practices and their cultural value.

3.3.4 Making culture personal

In response to the challenging context for the provision of opportunities for cultural engagement and participation at the local level, Arts Council England and other relevant publicly funded agencies, in partnership with amateur and voluntary organisations, should focus their energies and resources on developing a low-cost and sustainable, decentralised live and digital infrastructure for local participation and amateur activity, which builds on Arts Council England's 'Creative People and Places' initiative.

1. The necessary widening of participation at local and amateur levels should be funded by Arts Council England as part of its ongoing commitment to promoting participation and cultural diversity. The Commission calls for new projects and programmes of support as part of the 'Creative People and Places' initiative.[88]
2. DCMS, DCLG and DEFRA should commit to investing in a relatively inexpensive but highly effective initiative for the support and development of a local live and digital infrastructure for the promotion of participation and the taking up of creative hobbies. This would go some way towards addressing the concentration of resources and opportunities in London and the South East, as well as similar imbalances between urban and rural contexts, and the current focus of public policy and funding on building-based organisations.
3. The most effective way to encourage participation among people who do not currently take part in any cultural activity is through their peers: seeing people who live next to them, or work with them doing something creative is a powerful stimulation to trying something new. Opportunities to make amateur participation more visible should be encouraged by cultural organisations, working in partnership with local government and civic organisations, and the Commission welcomes the EU-funded 'Culture Guide' scheme currently being piloted in four regions across the UK.[89] Digital technologies also offer an opportunity to encourage, showcase and develop local amateur participation and should be supported by digital R&D schemes (see 2.3.3). Existing online networks, such as Hiive and Horsesmouth,[90] could provide useful models for connecting potential participants with cultural and creative mentors and 'buddies'.

Section 3 Endnotes

46 See: Bennett, T., Savage, M., Silva, E., Warde, A., Gayo-Cal, M. & Wright, D. (2009) *Culture, Class, Distinction*. Abingdon: Routledge.

47 The segmentation exercise we refer to was produced by the AHRC-funded Understanding Everyday Participation (UEP) project, which presented their data as evidence to the Commission: http://www.everydayparticipation.org. Dr Taylor, of the UEP project and Sheffield University also calculated the Arts Council England spending cited here; the calculation was based on 2012-2015 projections found here: http://www.artscouncil.org.uk/funding/apply-funding/funding-programmes/national-portfolio-funding-programme/the-national-portfolio-in-depth/artform-overviews/. The Taking Part data used for this calculation was the 2011-12 dataset, although data for different years yielded similar results.

48 BAME groups have shown substantial increases since 2005/06 in museum and gallery attendance (from 35.4% to 49.3%) and attendance at heritage sites (from 50.7% to 59.8%).See: 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 & 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.

49 The research that has been conducted at Manchester University within the Centre for Research on Socio-Cultural Change (CRESC) presents clear evidence of the richness, diversity and vitality of British people's everyday cultural lives. See especially: Bennett, T., Savage, M., Silva, E., Warde, A., Gayo-Cal, M.; Wright, D. (2009) *Culture, Class, Distinction*. Abingdon: Routledge.

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55 There is argument over the exact number of libraries that have closed since 2010. The number cited here is drawn from the statistics released by the Chartered Institute of Public Finance and Accountancy (CIPFA) at the end of 2013. For a discussion of the discrepancies between different statistical analyses, see: Farrington, J. (2014) Row over DCMS library closure statistics. *The Bookseller*. January 21. Available from: http://www.thebookseller.com/news/row-over-dcms-library-closure-statistics.

56 Sieghart, W. & panel (2014), *Independent Library Report for England*. London: DCMS. Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/388989/Independent_Library_Report-_18_December.pdf.

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58 See: Creative Skillset Census 2012; Annual Population Survey; TCR; Creative Skillset Workforce Survey 2010, Labour Force Survey, Apr 2012-Mar 2013.

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59 From written evidence submitted by a-n The Artists Information Company to the Warwick Commission on the Future of Cultural Value.

60 See: Counting Women In Coalition (2014) *Sex and Power 2014: Who runs Britain?* London: Centre for Women and Democracy. London: Centre for Women and Democracy. Available from: http://www.hansardsociety.org.uk/wp-content/uploads/2014/08/Sex-and-Power-2014.pdf.

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63 According to DCMS data: Publishing has highest number of BAME employees at 11.4%, lowest is Crafts at 4.5%, 6.7% in Music and performing and visual arts and 8.6% in Film, TV and radio

For jobs in the Creative Industries – highest number of BAME employees is in IT, software and computing at 15%, lowest is in Design at 6%. Film, TV and radio have 9.1% and Music and performing and visual arts 6.7%.

From: DCMS (2014) *Creative Industries: Focus on employment*. London: DCMS. Available from: https://www.gov.uk/government/publications/creative-industries-focus-on-employment.

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A study of equality and diversity in the cultural sector commissioned by Arts Council England and published in 2014 acknowledged that ‘disabled employees and disabled-led organisations are currently underrepresented in the 2012–15 Arts Council England National portfolio organisation and Major partner museum portfolio’, and that ‘less than one in 10 managers within the 2012–15 Arts Council England National portfolio organisations and Major partner museums are from a Black and minority ethnic background.’

See: Parkinson, A., Buttrick, J. & Wallis, A. (2014) *Equality and Diversity within the Arts and Cultural Sector in England: Evidence andliterature 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.

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77 See: http://ourculturalcommons.org/.

78 Craft has the highest proportion of BAME participants at 3%; dance, festivals, literature and theatre have 2%; and media, music and visual art 1%. See: Dodd, F., Graves, A. & Taws, K. (2008) Our Creative Talent: *The voluntary and amateur arts in England*. London: DCMS and TBR Available from: http://www.voluntaryarts.org/wp-content/uploads/2011/10/Our-Creative-Talent.pdf.

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81 See the speech by the current Secretary of State for Culture, Sajid Javid MP, ‘Culture for All’ 6 June 2014 (https://www.gov.uk/government/speeches/culture-for-all), in which he openly posited accessibility as the key shared goal for the cultural sector and policy makers. See also Harriet Harman MP’s speech ‘Young People and the Arts’ (http://www.harrietharman.org/speech-on-young-people-and-the-arts-at-the-roundhouse---09062014) delivered just a few days afterwards on 9 June 2014.

82 The vital social and economic importance of diversity is grounded in the key speech given by Sir Peter Bazalgette, Chair of Arts Council England and one of our Commissioners.

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Recruiting fairly and from as wide a base as possible and encouraging industry entrants and production staff from diverse backgrounds; Encouraging diversity in output; Encouraging diversity at senior decision-making levels; Taking part in, or running, events that promote diversity.

See: http://creativediversitynetwork.com/resource/diversity-pledge/.

88 Their ‘Up for Arts’ projects, which aim to get people involved in arts and crafts with the help of BBC local radio stations, have budgets starting from around £10k per annum. http://www.voluntaryarts.org/take-part/up-for-arts-project/.

89 See: http://www.cultureguides.eu/pilot-work/pilot-work-in-uk/.

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http://www.horsesmouth.co.uk/.

Goal 3:

A world-class creative and cultural education for all to ensure the wellbeing and creativity of the population as well as the future success of the Cultural and Creative Industries Ecosystem.

4

Education and skills development

The strength and diversity of the ecosystem depends upon a broad and balanced education that develops a wide range of creative professional pathways and an active cultural life as entitlements.

4.1 Context:

Education and skills, along with talent development, are key levers for social and cultural change and are vital if we are to achieve the triple win of a more diverse and representative Cultural and Creative Industries Ecosystem, powering greater innovation and growth, and full participation by all in our cultural life. A quality cultural and creative education allows people to develop rich expressive lives, and it is essential to the flourishing of the UK's cultural and creative identity and the Cultural and Creative Industries that this opportunity is not limited to the socially advantaged and the privately educated.[91] This is a fairness, equity and economic imperative.

The strength and diversity of the Ecosystem depends upon a broad and balanced education that develops a wide range of creative professional pathways and an active cultural life as entitlements. The UK's wider economic success also depends on creativity, which ensures excellence in a vast range of sectors beyond the Cultural and Creative Industries.

4.1.1 An entitlement to arts and culture

The arts, culture and heritage are an essential part of our personal and national character and act as catalysts for creative as well as human development. DfE recognises that they are the foundation for developing the imagination, forms of cultural expression and quality of life that are essential for human development and wellbeing. A recent YouGov poll suggested that investment in the development of creative talent (40%) and arts education (24%) are the key priorities for public spending on the arts and culture from the public's perspective.[92] The Commission acknowledges the important work of the Cultural Learning Alliance and supports its Manifesto, A Right to Culture for Every Child, which sets out the key actions needed to ensure a quality cultural education for all, many of which are reflected in the recommendations in this section.[93]

In 2003-13 there has been a 50% drop in the GCSE numbers for Design and Technology and 23% for Drama. In 2007-13 there has been a 25% drop in other craft-related GCSE's. There has been significant growth in Media and, in particular, screen-based art forms such as Film (70%). However, a significant number of pupils do not take any creative or cultural subjects at GCSE.[94]

Education and skills, along with talent development, are key levers for social and cultural change and are vital if we are to achieve the triple win of a more diverse and representative Cultural and Creative Industries Ecosystem, powering greater innovation and growth, and full participation by all in our cultural life.

4.1.2
An entitlement to a fused STEAM + curriculum

There are major concerns that the educational system is not focussing on the future needs of the Cultural and Creative Industries and the broader needs for innovation and growth in the UK. There is a general agreement within the Cultural and Creative Industries and industry more broadly that the Government's focus on Science, Technology, Engineering and Maths (STEM) should include the Arts (STEAM).

However, the Commission shares the concerns of others, including Nesta, that policymakers are obsessed with a siloed subject-based curriculum and early specialisation in Arts or Science disciplines that ignores and obscures discussion around the future need for all children to enjoy an education that encourages creativity, making and enterprise across the curriculum. We need creative scientists as much as we need artists who understand the property of materials and the affordances of new technology.

The reference in our goal to a world class creative and cultural education recognises that school systems, in Asia in particular, are re-thinking their educational paradigms to focus on creativity, culture and enterprise. We are already behind other leading powers in re-imagining learning in the 21st Century to ensure that current and future generations have the technological, entrepreneurial and creative confidence and skills to drive economic growth.[95] We may also be behind in recognising the transformative powers of the arts and cultural learning in building capability, self-esteem and well-being in individuals and in our national identity.

In 2012-13, only 8.4% of students combined Arts and Science disciplines in their AS-levels.[96] An analysis of what combinations of subjects were chosen at A-level by students in 2011 shows that only 2% of the overall number of students taking A-level Physics (2.7% of those taking Maths) also took an A-level in Arts & Design (Fine Arts), for example with the percentage even lower for boys. When looking at the A-levels studied by applicants for different university subjects in 2011, we see that only 8.4% of students accepted for Creative Arts & Design undergraduate courses had taken Maths A-level, and only 5% of those accepted for Maths and Computer Science courses had studied A-level Art and Design.[97]

Our national education and skills offer should not be judged against the Programme for International Student Assessment (PISA) rankings alone.[98] It is equally important that the UK ranks highly in terms of enterprise and creative achievement measured through indicators such as the Global Entrepreneurship Monitor (GEM), which assesses the national level of entrepreneurial activity in 70 countries.[99] Research shows that there can be a negative relationship between high test scores in reading, maths and science and the development of entrepreneurial mind-sets and skills.[100] Many of our global competitors, particularly in Asia, have already woken up to this reality.

We need creative scientists as much as we need artists who understand the property of materials and the affordances of new technology.

▼ 50%

Between 2003-2013 there has been a 50% drop in the GCSE numbers for Design and Technology and 23% for Drama. Between 2007-2013 there has been a 25% drop in other craft related GCSE's.

4.1.3
An entitlement to graduate-level cultural and creative education

There are key employment trends in the Ecosystem which impact on the availability, quality and relevance of vocational and Higher Education courses on offer. Some estimates suggest that graduate employment will rise in the Cultural and Creative Industries to 67% by 2020.[101] There are lower than average numbers of women and BAME students in courses feeding the Cultural and Creative Industries.[102] We suspect that there are also lower than average numbers of students from low-income backgrounds, but further systematic research is needed to support this claim.

The number of graduate internships in the Cultural and Creative Industries is increasing rapidly. In a recent study of respondents drawn from the Cultural and Creative Industries workforce, 91% said they had worked for free at some point in their career yet only 28% indicated that working for free had led to paid work.[103] In the design industry, 31% of employers report that they use unpaid internships as a source of employees[104] and in journalism 90% of work placements are unpaid.[105] The Low Pay Commission reports there is a growth in internships and other forms of unpaid work placements that, in their view, denote activities that look like work and to which the National Minimum wage should apply.[106]

The goal is to ensure that those creative and cultural experiences and capabilities that are increasingly being limited to the wealthiest and least representative groups are also made available to all.

Without educational intervention we are in danger of allowing a two-tier system in which the most advantaged in social and economic terms are also the most advantaged in benefitting economically, socially and personally from the full range of cultural and creative experiences.

4.1.4
An entitlement to vocational and work-place training

It is imperative to the growth of the Cultural and Creative Industries that there is a comprehensive system of talent development, skills training, apprenticeships and careers advice to meet the future demand for creative talent necessary to the success of the Cultural and Creative Industries. The **Create UK* strategy has recently made substantial recommendations, which the Commission endorses, about access to training and skills development, particularly in the context of rapidly growing demand caused by the successful introduction of tax incentives in some areas of the creative industries, and the problems faced by small and medium-sized enterprises (SMEs) in accessing accredited training for apprenticeships.

The Cultural and Creative Industries were one of the first sectors to create Apprenticeships for higher-level training equivalent to graduate level and there is appetite for developing high-level skills through vocational and work-based training routes.

There have been recent interventions designed to tackle the potential inequalities in access to significant and remunerated work experience in the Cultural and Creative Industries. Both of the relevant Sector Skills Councils have well-developed apprenticeship and quality assurance schemes across the Cultural and Creative Industries.

91%

of the cultural creative workforce said they had worked for free at some point.

4.2 Challenges

4.2.1 Schools

The devolved governments of Wales[107] and Scotland[108] have produced their own visions for the future of cultural education in particular and the Commission suggests that the rest of Britain should follow in their path. The foundations for such a vision have been laid both in DfE's *Ambitions for World Class Cultural Education*[109] and in *Create UK.[110] These provide the routes to a vision that is directed towards ensuring opportunity and choice for all young people to develop the creative, technical and entrepreneurial skills that drive the success of the Cultural and Creative Industries and to participate in a wide range of forms of cultural expression both as makers and audiences.

Children born into low-income families with low levels of educational qualifications are the least likely to: be employed and succeed in the Cultural and Creative Industries; engage with and appreciate the arts, culture and heritage in the curriculum; experience culture as part of their home education and have parents who value and identify with publicly funded arts and heritage. This is not to suggest that these same children do not enjoy rich cultural lives and experiences, rather the goal is to ensure that those creative and cultural experiences and capabilities that are increasingly being limited to the wealthiest and least representative groups are also made available to all.

Without educational intervention we are in danger of allowing a two-tier system in which the most advantaged in social and economic terms are also the most advantaged in benefitting economically, socially and personally from the full range of cultural and creative experiences. Without educational intervention the range of voices, talent and experiences given expression in the Cultural and Creative Industries will be impoverished and increasingly limited to the most social and economically advantaged groups.

In England, there has been a significant decline in the number of state schools offering arts subjects taught by specialist teachers. Since 2010 the number of arts teachers in schools has fallen by up to 11% - Design and Technology has 11% fewer teachers and hours of teaching; Drama 8% fewer teachers and 4% fewer hours taught (these hours include teaching time from non-specialists); Art & Design 4% fewer teachers with a decline of 6% in teaching hours.[111] In schools where a subject has been withdrawn, Drama and Performing Arts has dropped by 23%, Art by 17%, Design Technology by 14% and Textiles by 11%[112] and that this has disproportionately impacted on schools serving the most disadvantaged pupils.[113] In addition, a recent Ofsted report found that the arrangements for careers guidance in schools are not currently working well enough.[114]

4.2.2 Beyond the school curriculum

Research by the Sutton Trust[115] indicates that 76% of parents say that their children regularly participate in extra-curricular activities, which include sport and non-arts cultural activity. However, there are often significant costs associated with extra-curricular opportunities, which put them beyond reach for low-income families in particular. 22% of parents in the higher social groups pay £500 plus a year on these activities compared to 10% of parents in middle and lower groups.

Children of parents with educational qualifications are also more likely to access extra-curricular activities than those without academic qualifications. There are also significant differences in the time spent on cultural activities between the two groups. Research by Ipsos MORI shows that 70% of children whose parents do not have graduate qualifications spend fewer than three hours a week on cultural activity compared to 80% of the children of graduate parents who spend more than three hours a week.[116]

76%

of parents say that their children regularly participate in extra-curricular activities, which include sport and non-arts cultural activity.

22%

of parents in the higher social groups pay £500 plus a year on these activities compared to 10% of parents in middle and lower groups.

4.2.3
Higher Education (HE)

Reduced levels of funding in the HE sector have led to a decline in the number of key specialist courses offered. There has, for instance, been a 58% decline in the last five years in Ceramics and Glass courses. There are pressures on other specialist courses to raise staff-to-student ratios and reduce the hours of practice and study with a 46% drop in craft related courses.[117]

There is evidence of an over-supply of graduates seeking employment in cultural and creative occupations. This encourages employers to fill administrative, support and managerial roles that do not require technical skills or specialist creative talent, with graduates who may be over-qualified for the roles they fill.[118] The over-supply of graduates has also created a culture of unpaid internships, work placements, closed social networks and falling levels of pay which disadvantage BAME, women and students from low-income backgrounds in particular and does not promote the diversity needed for a successful creative economy.

46%

Drop in craft related courses.

4.2.4
Vocational and specialist training

To be successfully employed in the most creative roles in the Cultural and Creative Industries requires specialist training to graduate level, and the UK has world-class and leading specialist training in Architecture, Film and Media, Design, Music and in the Performing and Visual Arts, which are essential to producing skilled creative talents. These specialist courses often combine academic study with intensive and costly vocational and technical training that requires significantly longer hours of study and much lower staff-to-student ratios.

Small institutions, some of which are privately owned and run, offer many of the most highly-regarded courses. Research by Drama UK shows that in the performing arts, for instance, 36% of artists with successful careers in film and TV have specialist training to HE level rising to 80% for those employed in theatre.[119] In the current fiscal climate it is difficult for these institutions, which are essential to the most skill-intensive end of the labour market, to remain economically viable without restructuring or additional public and industry investment. It is imperative that BIS maintains the levels of public investment in these courses and institutions if we are to remain world leaders and build a more diverse creative workforce.

Work place training is also essential for fine-tuning and applying skills in professional and commercial settings. Nationally organised and distributed apprenticeship-routes will contribute to a more diverse and socially mobile talent base. But recent changes to the Access To Work benefits for Deaf and Disabled people will severely impact on their ability to access this mode of training.

Overall, the Apprenticeship landscape is far from ‘friendly’ for the Cultural and Creative Industries: with the majority of companies being sole-traders or operating with fewer than ten people, taking on an apprentice is a big ask. There have been significant reductions in the Further Education and Skills Budget (for England), so finding resources to create new vocational routes and qualifications for apprentices is even more challenging.

4.3
Recommendations

4.3.1
Consolidating our cultural and creative education

DfE and Ofsted must ensure that all children up to the age of 16 receive a cultural education in order to ensure their life-long engagement and enjoyment as audiences and creators. In addition, policymakers and educators should do their utmost to give young people at all stages of the education system exposure to the multi-disciplinary mix of science, technology, arts, humanities and enterprise that underpins creative success in the UK.

1. A national vision for England's cultural and creative education ambitions needs to be proposed jointly by DfE and DCMS to match those produced for Wales and Scotland.
2. An arts or media subject must be included in the English Baccalaureate, improving the visibility of the arts and increasing incentives for young people to combine science and arts subjects at Key Stage 4.
3. BIS should remove barriers to multi-disciplinary education at A-level by challenging the definition of 'facilitating subjects' that universities, including the Russell Group, use when advising young people which A-levels they should pick to keep their university options open. Arts subjects are currently excluded by some universities, and in some cases are even part of universities' 'non-preferred lists' of subjects, belying ignorance of the wider benefits of arts qualifications in terms of the creative skills they develop.
4. Ofsted should not designate a school as being 'outstanding' without evidence of an excellent cultural and creative education. A lack of such opportunities within the curriculum and beyond should be reported on and be raised as a matter of concern.
5. DfE and BIS must ensure that there is adequate careers advice available to those interested in pursuing a career in the Cultural and Creative Industries. The new careers and enterprise company recently announced by DfE[120] must work together with the Cultural and Creative Industries Ecosystem to support teachers and careers advisors in providing guidance and inspiration to young people.
6. The Arts Council England's target of 50% schools having an Artsmark award should be supported and by Ofsted and the DfE.
7. All publicly funded Cultural and Creative Industries organisations should have a member with expertise in education and skills training on their boards. It is essential that strong leadership in these areas informs and guides decisions made at the highest levels.

4.3.2
Addressing children's creative aspirations

Local arts and cultural organisations in receipt of public funding must collaborate more effectively to ensure a visible, coherent and accessible offer of extra-curricular activities and should work with the relevant careers agencies to improve careers advice. Organisations should be incentivised to increase demand and take-up from children, young people and families previously less engaged with this offer.

1. The Ofsted inspection framework should require schools to provide an embedded cultural education for all children up to the age of 16, allowing governors, parents and trustees to hold headteachers responsible for this provision.
2. Government should provide an Arts and Culture Pupil Premium[121] to match the current £45m PE/Sport Premium so as to increase the choices for our most disadvantaged and culturally disenfranchised children. Alternatively, this could be achieved by ring-fencing 10% of the Pupil Premium for creative and cultural enrichment.
3. All Cultural and Creative Industry employers in receipt of public funding/tax breaks/NIC breaks should be expected to reach out and involve schools and young people in participation, and support careers pathways into the industries.
4. The existing patchwork of public and commercial arts and creative education centres providing extra-curricular opportunities and careers advice needs to be better sign-posted, coordinated, scaled up and mapped against demand and need. This work should be led by DfE and DCMS in partnership with the Creative Industries Council and the Creative Industries Federation. The remit must be to offer extra-curricular live and digital opportunities in a wider range of arts and creative skills and to offer children the chance to connect the arts, creativity, enterprise and technology.

4.3.3
Underpinning graduate and skills pathways

Government must ensure that access to training for the Creative and Cultural Industries in Higher and Further Education is appropriate for the flow of talent and expertise needed and for education pathways that feed cultural and creative growth.

1. The Cultural and Creative Industries should work in partnership with Higher Education to identify excellence in HE provision through a sector-led accreditation process, building on best practice across all relevant disciplines in order to lever the best outcomes for all students and to focus resources from public and private investment. This process should build on Creative Skillset's successful Tick programme.[122]
2. Funding from the Higher Education Funding Council for England (HEFCE) to support Higher Education courses relevant to the technical and creative talent required by the Cultural and Creative Industries (including additional funding for intermediate-cost studio-based subjects and institution-specific funding) must be maintained at an appropriate level to underpin graduate access to training for a future high-quality and diverse workforce. With this goal in mind, HEFCE should review the bases of these funding streams to ensure that they enable institutions to meet the cost of provision in these more expensive subject areas.
3. Cultural and Creative Industries, working in partnership with the HEIs that are recognised as delivering excellence, should mutually encourage creative graduate engagement nationally and in their localities (assuming there is an employment base in their localities).
4. There should be a national Creative Apprenticeship brokerage service, delivered by a single combined Sector Skills Council covering the Cultural and Creative Industries and linked to the National Plan, with more detailed and robust data on pipeline supply of creative talent. This scheme would rationalise and scale up existing initiatives by BIS, Arts Council England and current Sector Skills Councils.
5. Higher Education and Further Education institutions should work closely with the Cultural and Creative Industries to join up employer needs with their courses and, through better partnerships, increase the supply of internships and work placements.
6. Bursary and scholarship schemes, which are essential for ensuring access for the most disadvantaged students, should be merged into one nationally administered scheme for ensuring talented students from low-income backgrounds can access specialist training. They must have consistent criteria for allocating awards and ensuring the quality of training in the independent as well as public sector.
7. Cultural and Creative Industries organisations in receipt of public funding or tax concessions need to adhere to and implement the good practice and guidelines to fairer access and transparent internship recruitment practices produced by Sector Skills Councils and Arts Council England.

Section 4 Endnotes

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From: Greevy, H., Knox, A., Nunney, F. & Pye, J. (2013) *Revised: The effects of the English Baccalaureate*. London: Ipsos MORI & DfE. Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/183528/DFE-RR249R-Report_Revised.pdf.

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122 For a course or apprenticeship to be awarded the Creative Skillset Tick, it has to undergo a rigorous assessment process conducted by experts working in the Creative Industries. They only give the Tick to those courses and apprenticeships that have the strongest links with industry. See: http://courses.creativeskillset.org/pick_the_tick_degree_courses/what_is_the_tick.

Goal 4:
A thriving digital cultural sphere that is open and available to all.

5

Digital culture

5.1 Context

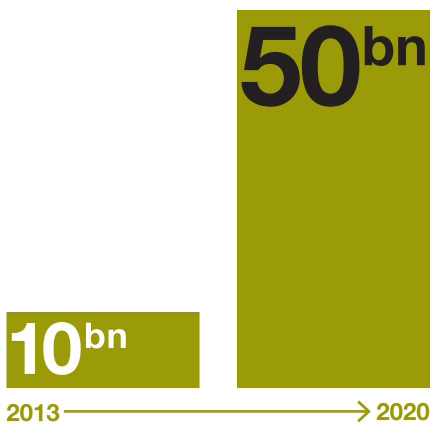
The digital revolution is transforming culture, just as it is transforming other aspects of our lives. It has increased levels of participation in informal cultural and creative activities, created new networks and forms of interaction, transformed the production and distribution of established art forms and allowed new art forms to emerge. An increasing number of arts, cultural and heritage organisations are exploiting the possibilities offered by new digital technologies to develop, reach and communicate with audiences in innovative and creative ways.

5.1.1 Rise of digital technologies and participation

The rise of digital technologies has happened at a phenomenal rate, both in terms of consumption and active participation. There are approximately 1.2 billion smartphones in the world, a figure estimated to rise to three billion by 2017.[123] In 2013 there were around 10 billion Internet-connected devices, which could rise to 50 billion by 2020.[124] In 2008 around 12% of consumer spending on media and entertainment was devoted to digital products and services; by 2017 that is expected to have risen to around 50%.[125] Access to the Internet in a modern, safe, non-judgemental space has been identified as a key need, in particular for the most vulnerable in society. A recent report on libraries in the UK calls for free WiFi to be rolled out in every library in the country[126] and there are signs that government is receptive to such recommendations. Its £150m SuperConnected Cities programme[127] – part of a broader initiative to improve provision and speed of broadband in rural and urban areas[128] – includes plans to transform over 1,000 public buildings in cities across the UK into free WiFi hotspots.[129]

Digital culture (cultural activity grounded in the use of digital technologies) has enhanced our ability to be both creative producers and consumers of culture and to download, remix and redistribute existing material as well as creating and sharing original content. The nature and extent of creative and cultural participation has changed, provoking important legal, logistical and philosophical questions about copyright, authorship, ownership, commodification, user agency, labour, intellectual property, identity, provenance, aesthetics, power and cultural participation. An Arts Council England report concluded in 2010 that some forms of online engagement with culture augment, rather than replace, live experiences[130] and this has been backed up by findings that NT Live appears to have grown, rather than cannibalised, audiences for theatre, not only at the National Theatre itself but also at other theatres.[131]

The digital revolution is transforming culture, just as it is transforming other aspects of our lives. It has increased levels of participation in informal cultural and creative activities, created new networks and forms of interaction, transformed the production and distribution of established art forms and allowed new art forms to emerge.



In 2013 there were around 10 billion Internet-connected devices, which could rise to 50 billion by 2020.[124]

5.1.2 Digital R&D

Over the past five years there have been concerted and strategic efforts in the arts, cultural and heritage sector to experiment with digital technologies in the production and dissemination of its work. The Digital R&D fund – a joint venture between Nesta, Arts Council England and the AHRC – was first set up as a pilot project in 2011/12 to support arts and cultural organisations across England who want to work with digital technologies to expand their audience reach and engagement and/or explore new business models.[132] The AHRC-funded CATH Project (Collaborative Arts Triple Helix) is running a wide range of research projects bringing together HEIs, SMEs and small cultural organisations.[133] Both projects have generated a number of exciting innovations, ranging from an app that delivers captioning and audio description directly to audience members' smartphones[134] to digital memory boxes for people with dementia.[135] In addition, cultural institutions have the opportunity to employ open data[136] as an engagement tool. Nesta and the Open Data Institute are currently running a challenge prize to develop products and services that use at least one open data dataset published by a UK public body, to deliver value to people who are not well served by current heritage and culture offers.[137]

51%

of arts and cultural organisations currently using the Internet to generate new revenue streams.

This innovation has been funded despite the fact that there is no substantial, non-commercial publishing environment through which this type of work may be made available. Therefore, at the same time as three quarters of organisations see digital communications and infrastructures as a crucial part of their public interface, 88% of these organisations currently choose to publish and communicate through free-to-use, but essentially commercially motivated, platforms.[138] It is the Commission's belief that there is a need for a public-service alternative, which may solve issues surrounding the ownership of users' data, the securing of the long-term future of publicly funded cultural assets and the guarantee of public access to them. As with broadcasting, there is the potential for conflict between the commercial imperatives of companies like Google, Amazon and YouTube and the public service remits of some of the Cultural and Creative Industries.

5.1.3 New revenue streams

Digital technology is also becoming increasingly important for cultural business models with 51% of arts and cultural organisations currently using the Internet to generate new revenue streams, an increase of 17% on 2013.[139] The Internet offers the Cultural and Creative Industries an opportunity to raise money by, for example, using crowdfunding platforms to generate income for new projects, accepting online donations, and selling products or merchandise online. Collaborative finance, such as crowdfunding, can provide an alternative or supplementary revenue stream for subsidised organisations and can offer commercial ventures a viable alternative to traditional sources of loans and investment. Some £200 million was invested using crowdfunding in the UK in 2012 and it is estimated that 25% of UK adults had used Internet technology to share resources and funds in 2013.[140]

£200 million

was invested using crowdfunding in the UK in 2012.

It is the Commission's belief that there is a need for a public-service alternative, which may solve issues surrounding the ownership of users' data, the securing of the long-term future of publicly funded cultural assets and the guarantee of public access to them.

There is an urgent need to create a joined-up approach to technological innovation, content creation and digital access to the Cultural and Creative Industries.

11 million

people in the UK lack basic digital skills, of whom 57% are in the two lowest income groups.[142]

5.2 Challenges

There remains a range of challenges that must be addressed if the Cultural and Creative Industries are to exploit fully the opportunities offered by digital technologies. There is an urgent need to create a joined-up approach to technological innovation, content creation and digital access to the Cultural and Creative Industries.

5.2.1 Audiences, access and accessibility

Increased levels of digital engagement have not by themselves led to greater access to and participation in the many parts of the Cultural and Creative Industries for some individuals and groups. Specifically, there is still a marked digital imbalance in relation to:

- Who has and does not have access to the Internet.
- The speed, quality and cost of access that people have.
- The quality and version of hardware, software and operating systems.
- People's geographic or physical location.
- People's degree of physical or cognitive ability or disability.
- The level of complexity, confidence, permission and sophistication of their use of digital technology.[141]

Each of these leads to some degree of differential access to the sum total of the UK's digital cultural offer. One of the most significant challenges to digitally-engaged Cultural and Creative Industries (which in time will mean all Cultural and Creative Industries) is how to make this digital access available to all so that the expectation of universal access to culture that we have created around free-to-air broadcasting is carried over online and we are able to deliver a 'free-to-net' equivalent.

Those who are most likely to be disadvantaged by the impact of these imbalances are people who are unemployed, on lower incomes, disabled, retired, in lower socio-economic postcodes, and those with lower levels of education. A 2013 BBC report found that 11 million people in the UK lack basic digital skills, of whom 57% are in the two lowest income groups.[142] This divide is mirrored in smartphone usage: over two-thirds of those in the highest income groups own a smartphone, compared with less than 50% in the lowest income groups.[143] Similarly, young people's usage of their mobile phones reveals a divide along socio-economic lines: 5-15 year olds in the lowest income groups are far more likely to have a pay-as-you-go arrangement than those in the highest income groups (73% vs 52%).[144] In general, such payment methods restrict Internet usage, making it less likely that they will use their phones to go online.

Disabled people are also disproportionately disconnected from the UK's digital life. Of the 6.4 million adults who have never used the Internet, 3.5 million (55%) are disabled, which represents 30% of those UK adults with a disability.[145] This may be largely attributed to the inaccessibility of mainstream gadgets coupled with the expense of specialist equipment.[146]

Furthermore, having access to the Internet does not solve all of the issues around participation. A recent report revealed that 46% of Internet users had experienced harassment online and 73% had witnessed someone else being harassed.[147] Misogynistic, racist and homophobic abuse is pervasive on social media and comments forums. Whilst online resources have proven to be invaluable ways of engaging for many disabled people, abuse, including vicious accusations of benefit fraud and faking disabilities, can also be part of the online experience.[148] This online intimidation is designed to, and often succeeds in, affecting the inclusivity of digital participation.[149]

Of the 6.4 million adults who have never used the Internet, 3.5 million (55%) are disabled.[145]

Issues of security, privacy and safety online are also of growing concern to current users and non-users alike. An inclusive and vibrant digital ecosystem demands that citizens have the opportunity to access the full range of cultural services and resources – whether made available on commercial or non-commercial terms – without having to hand over control of their data or ownership of their creative contributions to the service providers. What is needed is a secure and wholly user-centred identity management and authentication system that guarantees easy and secure access.[150]

5.2.2 Cultural organisations

While 73% of the 947 cultural organisations surveyed in England say that digital activities have had a major positive impact on their work, many still perceive significant barriers to achievement of their digital ambitions, particularly in relation to skills training and digital R&D. The same report found that 70% of the 900 arts and cultural organisations surveyed in England cite lack of funding and time as the most significant obstacles to developing robust digital structures, and over a third feel that they do not have the in-house skills, IT systems or the necessary expert advice to meet their digital aspirations.[151] Skills gaps are holding some organisations back, with the most significant being in data analysis, database management and software development. What is more, almost a quarter feel hindered by a lack of understanding of what digital technologies can do for their organisation.

5.2.3 Search/taxonomy

An online resource of any kind can only be used if it can be discovered, and search engines like Google, Yahoo and Bing have grown up over the last twenty years of the web precisely because the rich hypertexts we experience online are not easy to navigate. Within the GLAM sector (Galleries, Libraries, Archives, Museums) catalogues are created and held in databases and often published using a 'linked data' approach, providing rich, structured data which is readily discovered and processed by software with no specific prior knowledge about the source of that data.

Over-reliance on the large commercial search engines creates a danger that the valuable material in the public domain published by Cultural and Creative Industries will simply vanish from view, never appearing in the first (or first twenty) pages of search results. Building a new search engine is not feasible. But encouraging all publicly funded sectors of the Cultural and Creative Industries to adopt the same cataloguing and data publishing principles used in GLAM is neither onerous nor technically challenging, and would make it far simpler to build specific discovery tools and other products around their published digital assets.

73%

of the 947 cultural organisations surveyed in England say that digital activities have had a major positive impact on their work.

Over-reliance on the large commercial search engines creates a danger that the valuable material in the public domain published by Cultural and Creative Industries will simply vanish from view.

5.3 Recommendations:

5.3.1 Creating a digital public space

The Warwick Commission supports the creation of a Digital Public Space (DiPS), free from political and commercial interference and created solely for the public good. This would grow over time to become a kind of digital 'cultural library' of the UK's artistic and cultural assets, guaranteeing secure and equitable access to all forms of digitised content and resources. This shared digital space would enable individuals and organisations to discover, enjoy and contribute to our creative inheritance as cultural producers, consumers and curators. The DiPS would provide a safe and secure environment in which everyone is empowered to assume their full and fulfilling role as digital cultural consumers, regardless of skill level, ability, status or income.

1. All publicly funded creative content must be made easily discoverable and available to the public. Once their commercial IP value has legally expired or the rightsholder considers them to be no longer commercially valuable, these assets should be made available for free.
2. An Internet domain name should be registered and used as a universal 'label' to identify resources within the DiPS, as well as providing a starting point for navigation through it.
3. Identity and authentication standards must be developed that will enable every person to access, use and communicate with UK public organisations without the risk that their data and interactions are used (or abused) without their explicit consent, while at the same time safeguarding other users and participating organisations from negative, destructive or otherwise harmful behaviour or activity.
4. A way of delivering 'free-to-net' access to the DiPS should be established, that is accessible to all, free at the point of use and is not dependent on satisfying commercial imperatives for access to digital assets held in the public domain. This may involve specific allocation of IP bandwidth or another mechanism, but care must be taken to implement it without putting net neutrality at risk.

5.3.2
Accelerating digital R&D

DCMS should recognise the opportunities that digital technologies present for access and participation in the arts and enable the organisations they support to maximise their potential benefits.

1. Funders should be bold in exploiting the opportunities presented by digital technologies and sustain their spending on digital R&D grants, in particular, to ensure that Cultural and Creative Industries organisations can experiment with innovative content production, audience engagement and business models, and explore ways of creating new forms of cultural and social value as technologies evolve.

2. R&D grants should be supported by a training and development offer to build digital skills and confidence, similar to the Publishers Association and the Reading Agency's Digital Skills Sharing Project for libraries,[152] and increase awareness of the diverse needs of audiences, in particular those with disabilities.

3. Organisations in receipt of digital R&D funding continue to be obligated to share their skills and experience with other cultural organisations in a structured way that aims to create a 'trickle down' effect. This may include expanding the existing *Native* database of digital R&D case studies from the Digital R&D Fund for the Arts to provide more in-depth information, initiating knowledge-exchange schemes that see grant holders 'buddy up' and mentor those individuals and organisations interested in developing their digital opportunities.

Section 5 Endnotes

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125 DCMS (2014) *It's Still about the Audience: Two years on from the Film Policy Review*. London: DCMS. Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/274265/1316-A_Film_Policy_Doc_ACCESSIBLE.pdf.

126 Sieghart, W. & panel (2014), *Independent Library Report for England*. London: DCMS. Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/388989/Independent_Library_Report-_18_December.pdf.

127 See: https://www.connectionvouchers.co.uk/superconnected-cities/.

128 See: https://www.gov.uk/government/policies/transforming-uk-broadband.

129 See: https://www.gov.uk/government/policies/transforming-uk-broadband/supporting-pages/investing-in-super-connected-cities.

130 However, the report also notes that 'digital media are more valuable as a means of reaching out to audiences that are already culturally engaged' than reaching new audiences.

Arts Council England, Arts and Business, Museums, Libraries and Archives (2010) *Digital Audiences: Engagement with arts and culture online*. [online] Available from: http://www.artscouncil.org.uk/media/uploads/doc/Digital_audiences_final.pdf.

131 Bakhshi, H. & Whitby, A. (2014) *Estimating the Impact of Live Simulcast on Theatre Attendance: An application to London's National Theatre*. London: Nesta. Available from: http://www.Nesta.org.uk/publications/estimating-impact-live-simulcast-theatre-attendance-application-london%E2%80%99s-national.

132 http://www.Nesta.org.uk/project/digital-rd-fund-arts. Similar funds have been set up in Scotland in partnership with Creative Scotland, Arts & Humanities Research Council and Nesta (http://www.Nesta.org.uk/project/digital-rd-fund-arts-scotland) and in Wales (http://www.Nesta.org.uk/project/digital-rd-fund-arts-wales).

133 The CATH project began in the Spring of 2013 and is funded by the AHRC's 'Creative Economy Knowledge Exchange' programme. Run in partnership by the Digital Humanities Hub (University of Birmingham) and the School of Museum Studies (University of Leicester), CATH has used a series of workshops to bring together academics, SMEs, and Small Cultural Organisations (SCOs) to work in Triple Helix collaborations. http://www.cathproject.org.uk/.

134 This has been developed by the National Theatre for Scotland. See http://artsdigitalrnd.org.uk/wp-content/uploads/2014/06/08_National-Theatre_Singles.pdf.

135 Co-developed by Ayogo, B-Arts and Birmingham Law School. See http://www.cathproject.org.uk/project/lifestreams-legal-and-ethical-perspectives-on-digital-memoryboxes-for-families-living-with-dementia-2/ .

136 Ofcom (2014) *Results of Research into Consumer Views on the Importance of Communications Services and their Affordability*. [online] Available from: http://stakeholders.ofcom.org.uk/binaries/research/affordability/affordability_report.pdf.

137 See: http://www.Nesta.org.uk/heritage-culture-open-data-challenge.

138 Arts Council England, AHRC & Nesta (2014) *Digital Culture 2014: How arts and cultural organisations in England use technology.* [online] Available from: http://artsdigitalrnd.org.uk/wp-content/uploads/2014/12/Digital-Culture-2014-Research-Report1.pdf.

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140 Stokes, K., Clarence, E., Anderson, L. & Rinne, A. (2014) *Making Sense of the UK Collaborative Economy*. London: Nesta. Available from: http://www.Nesta.org.uk/sites/default/files/making_sense_of_the_uk_collaborative_economy_14.pdf.

141 The OECD defines the term 'digital divide' as referring to 'the gap between individuals, households, businesses and geographic areas at different socio-economic levels with regards both to their opportunities to access information and communication technologies (ICTs) and to their use of the Internet for a wide variety of activities'.

OECD (2001) *Understanding the Digital Divide*. Paris: OECD. Available from: http://www.oecd.org/sti/1888451.pdf.

142 BBC & Ipsos MediaCT (2013) *Media Literacy: Understanding digital capabilities follow-up*. [online] Available from: http://www.bbc.co.uk/learning/overview/assets/bbcmedialiteracy_20130930.pdf.

143 See: http://www.statista.com/statistics/300421/smartphone-usage-in-the-uk-by-socio-economic-group/.

144 Ofcom (2013) *Children and Parents: Media use and Attitudes report*. [online] Available from: http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/october-2013/research07Oct2013.pdf.

145 Office for National Statistics (2014), *Internet Access Quarterly Update, Q1*. [online] Available from: http://www.ons.gov.uk/ons/rel/rdit2/Internet-access-quarterly-update/q1-2014/stb-ia-q1-2014.html.

The ONS works with disability as defined by the Equality Act rather than the Disability Discrimination Act.

146 This is the conclusion of a report by disability charity Scope and the Helen Hamlyn Centre for Design.

Jewell, S. & Atkin, R. (2013) *Enabling Technology*. London: The Helen Hamlyn Centre for Design. Available from: http://www.hhc.rca.ac.uk/CMS/files/1.Enabling%20technology%20report%202013%20digital%20technology%20disabled%20people%20Scope%20Helen%20Hamlyn.pdf.

147 Duggan, M. (2014) *Online Harassment*. Washington DC: Pew Research Centre. Available from: http://www.pewInternet.org/2014/10/22/online-harassment/.

148 Ryan, F. (2014) "Social Media Means the Voices of the Disabled Can No Llonger Be Ignored by Those in Power." *New Statesman*, August 7. Available from: http://www.newstatesman.com/2014/07/social-media-means-voices-disabled-can-no-longer-be-ignored-those-power.

149 Okolosie, L. & Penny, L. (2014) "Sexists and Racists are Resorting to Online Sabotage. But They Still Won't Win." *The Guardian Online*, June 18. Available from: http://www.theguardian.com/commentisfree/2014/jun/18/sexist-racist-online-sabotage-wont-win-posing-online-feminists-leftists.

150 While steady progress is being made in the development of flexible and usable digital identity systems that are intended to be used across both private- and public-sector services, usage is limited to interactions with specific government services, and remains reliant upon a relatively small number of identity service providers operating in a federated model, rather than building upon decentralised technological capabilities in order to deliver truly decentralised user-centred identity.

151 Arts Council England, AHRC & Nesta (2014) *Digital Culture 2014: How arts and cultural organisations in England use technology*. [online] Available from: http://artsdigitalrnd.org.uk/wp-content/uploads/2014/12/Digital-Culture-2014-Research-Report1.pdf.

152 Run by The Reading Agency and the Publishers Association, and funded by Arts Council England's Libraries Development Initiative, the Digital Skills Sharing Project brings together six teams of librarians and publishers to work together on a specific reading campaign using a wide range of digital resources and digital communications methods. The aim is to enable participating library authorities to build a sustainable digital strategy and to connect publishers with a wide range of reading communities. See: http://readingagency.org.uk/digitalskills/about/about.php.

Goal 5:
A vibrant creative life at local and regional levels across the UK that reflects and enriches community expressions of identity, creativity and culture.

6

Making the local matter

6.1 Context

The Cultural and Creative industries have a big role to play in successful place shaping. Thus far, the emphasis has primarily been on the positive economic influences of a rejuvenated cultural offer across our towns and cities. Major cultural events and awards, such as the UK 'City of Culture' and the European 'Capital of Culture' schemes, contain the potential to boost local economies,[153] renew and strengthen infrastructures and revitalise community pride,[154] and enhance the reputation of cities and communities internationally. Projects such as 'Corridor Manchester'[155] show that the Cultural and Creative Industries have a crucial role to play in local and regional regeneration and demonstrate how these industries can work effectively with local civic, community and business leaders to meet audience and community needs.

We should be encouraging communities to see themselves as co-commissioners of their cultural and arts experiences, working with cultural partners locally and nationally. The challenge for the arts, culture and heritage sectors is to bring people from communities together in ways that reflect their expressions of identity and creative aspiration in a manner that can have a lasting impact on that local society.

Concerted policy support should cut with the grain of a place's established creative assets and aspirations. Areas such as Birmingham, Sheffield, Salford, Dorset, Bournemouth, East London and Brighton have developed successful creative clusters which link companies, sectors and local bodies to create hot houses for innovation and business.[156] Although there are still improvements to be made to foster these clusters, including data and mapping in order to connect groups of businesses in the most productive way, a quarter of Local Enterprise Partnerships (LEPs) have stated that the creative industries are a priority sector.[157]

However, the role of cultural organisations as strategic partners in the more fundamental place-shaping role, building and moulding local communities and identities, remains underdeveloped. As a result, whilst the accounts of place that civic leaders give are often redolent of local pride and distinctiveness, the economic, cultural and social strategies that are seen to comprise place shaping often lack such distinctiveness, are based on a superficial 'famous dates and people' idea of place identity or even disregard local cultural expression and heritage entirely.[158] The Heritage Lottery Fund and the RSA are addressing this issue in a recently launched programme, Heritage and Place: Phase 2, which will fund applied research into the potential role of heritage in local strategic planning and development.[159]

Therefore, just as important as an intelligent shift in resources to support place-based animation, is a mindset shift across our entire cultural and creative infrastructure that recognizes their responsibility to be more responsive to the needs of particular places and communities. We should be encouraging communities to see themselves as co-commissioners of their cultural and arts experiences, working with cultural partners locally and nationally. The challenge for the arts, culture and heritage sectors is to bring people from communities together in ways that reflect their expressions of identity and creative aspiration in a manner that can have a lasting impact on that local society.

Of course, the current economic climate poses significant challenges to all these place-making efforts. Many Local Government Authorities are protecting, albeit at a significantly reduced level, spending on the arts, culture and heritage in a period of severe reductions in their funding from central government. Even in austere times, local authorities in England are investing £1.6 billion in arts, culture and libraries.[160] However, with local government spending on the arts falling by 19% in the last three years,[161] the challenges created by budget cuts at local level represent a real threat to a nationally distributed Cultural and Creative Industries Ecosystem and the broader ecology that sustains them.

In response, a number of Local Authorities are exploring alternative ways to support the arts and culture in their area. These include implementing standalone trusts and community interest companies and moving from grant aid to a commissioner/provider relationship.[162] It is also important to note that Local Authorities are being driven by the balance sheet rather than hardening attitudes to the value of arts and culture. A recent survey asked local government employees the extent to which they agreed/disagreed with the statements 'Local government, as a sector, values the arts and culture' and 'My local authority values the arts and culture', and the general consensus was that both local government as a whole (67.2%) and specific authorities (87.4%) value the arts and culture.[163]

Local Authorities are being driven by the balance sheet rather than hardening attitudes to the value of arts and culture.

▼19%

Local Government spending on the arts has fallen by 19% in the last three years.

'My local authority values the arts and culture'

87.4%

of local government employees agree.

Nobody would argue that cultural provision is as strong as it could be in all regions, nor indeed that the arts and heritage sector cannot do more to ensure their impact is felt right across the country.

We need a portfolio strategy rather than allowing a narrow focus on postcodes to shape short or longer-term redistribution of investment.

6.2 Challenges

6.2.1 The challenge of the local

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. A recent Nesta report found that 43% of jobs in the creative economy are found 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 economy.[164] In terms of participation, engagement with the arts, culture and heritage is highest in the South West and South East of England, and lowest in the West Midlands.[165]

The Commission also notes the conclusions within the *Rebalancing our Cultural Capital* report, which drew attention to imbalances in funding across the country,[166] and Arts Council England's response to them.[167] Given this Commission's aspirations to ensure that everyone has the ability to lead a rich culturally expressive life and to enjoy the very best possible cultural experiences, we welcome these debates. Nobody would argue that cultural provision is as strong as it could be in all regions, nor indeed that the arts and heritage sector cannot do more to ensure their impact is felt right across the country.

As all of the key investors in the Cultural and Creative Ecosystem look to address these challenges, we would urge that in recalibrating investment to make the local matter we focus on a balanced range of investment rules, shaped by whole ecosystem considerations and clearly agreed outcomes across all the key investment communities. In other words, we need a portfolio strategy rather than allowing a narrow focus on postcodes to shape short or longer-term redistribution of investment.

For example, key public investors in the Cultural and Creative Ecosystem, who are already involved in co-investor relationships (from Local Authorities through to the Heritage Lottery Fund, Arts Council England and BFI, DCMS and BIS), could jointly create some clear whole ecosystem/portfolio investment rules which would be designed to create and sustain:

- A vibrant, intelligent, responsive and sustainable cultural infrastructure across the country that is capable of leveraging significant additional investment.
- A richer stream of talent and talent development activities across the country reflecting the full diversity of the UK.
- The highest possible quality cultural product to the largest possible audience, ensuring that subsidy per audience member is appropriate when assessed on excellence, equity and regional distribution grounds.

As the last bullet point underlines, meaningful metrics are vital to all these efforts. They produce sharper public policy questions. What, for example, is the required subsidy needed to transform attendance levels (at the requisite level of excellence and creativity) in certain regions? Next step debates about the role of culture in creating more vibrant places across the country need to be informed by more sophisticated cost-benefit analysis of value, return and cost.

In the short term, any significant rebalancing should aim to fortify the sector beyond the capital, boosting the levels of participation across the country and providing more substantive investment in new approaches to artistic provision and audience engagement in areas of lower participation – supported by the whole publicly funded cultural and creative infrastructure.

6.2.2
Investing to create sustainable centres of excellence outside London

There is a need to fashion proactively investment strategies and interventions that are more responsive to local need and demand, to talent from across the country, and to natural organic growth in the creative vibrancy of our town and cities.

New investments have to pass the future sustainability test, as well as other important return on investment (ROI) considerations. There would be little point in rebalancing expenditure across the country in the next two decades if that outcome did not boost demand and create a more resilient and sustainable arts, cultural and heritage sector.

We believe that a sustainable way to spread cultural opportunities across the country would be to ensure that Core Cities are the focus of co-investment activity (by Central and Local Government, Arts Council England and others) to build greater mass of arts activity and to create stronger regional centres with more organisations of appropriate scale.[168]

If we can create more local capacity to invest, then we also create the environment for more diversity in the system, as Local Authorities respond to local creative opportunity and the needs of local audiences. Working to a locality's distinct strengths increases the capacity to mobilise private investment and makes the combined potential cultural and creative output of the UK as a whole much greater.

London is also a major draw for talent that both depletes the regional pool of talent and reduces the range of talent development pathways. Stronger Core City cultural sectors would begin to counter this and create a more diverse range of pathways for talent development, not just for the Cultural and Creative Industries but for the wider economy, which has a growing demand for creative talent.[169]

6.2.3
The national has to be local too

In the cultural sector Arts Council England funds National Portfolio Organisations, Touring Companies and Bridge Organisations across the country and there are a number of examples of excellent cultural offer across England.[170] The House of Commons Select Committee's Work of Arts Council England Third Report of Session 2014-15 Report states that, whilst the Committee recognises the genuine national role that London's cultural institutions play in the cultural life of the country, they need to extend their reach further. They suggested that ways of achieving this include touring productions, making collections available electronically, live streaming and sharing expertise with smaller organisations.[171]

The Warwick Commission wishes to ensure that our national arts and heritage organisations deliver meaningful, accountable, national impacts felt in demonstrable ways in definable and measurable areas of benefits across the country. This would obviously have to include access to high quality work produced by our national companies, in which watching something live-streamed in a cinema does not become the default baseline entitlement of local communities outside of major population centres.

Over 40%

of audiences for London's cultural organisations come from other English regions.

The Warwick Commission wishes to ensure that our national arts and heritage organisations deliver meaningful, accountable, national impacts felt in demonstrable ways in definable and measurable areas of benefits across the country.

We also need further analysis on the value of our national cultural assets. For example, if one looks behind the headlines of the location and density of investment in arts provision, the impact of London on the wider cultural ecology is complex and hard to quantify, both on the supply and demand sides. Audience Agency's large-scale studies suggest that over 40% of audiences for London's cultural organisations come from other English regions, while the larger institutions attract huge number of overseas visitors, many over 50%, playing a vital role in the visitor economy.[172] Any strategy must recognise the connections that exist between the Cultural and Creative Industries in different parts of the country and the significant role that the capital plays in the health of the national ecosystem.

6.2.4
New models

New models of support and partnership, particularly at a local level need to be developed that pool financial and other administrative resources to maximise access and engagement in mixed investment opportunities. Well-resourced organisations in receipt of public investment should be required to work together with LEPs and local government and to partner, mentor and support smaller local creative and cultural businesses and enterprises.

6.3
Recommendations:

6.3.1
Fostering local creative growth

Local consortia of key public and private investors should develop place-based strategies for their future investments that are more responsive to local cultural and creative needs and demographics, to developing talent and opportunity across the nation and to natural organic growth in the creative and economic vibrancy of our towns and cities.[173]

1. A Cultural and Creative Industries Clusters Fund should be created from existing public resources, such as the Regional Growth Fund, and private investment from the Cultural and Creative Industries. This fund would support competitive local public/private consortia bids to establish new creative and cultural clusters outside London. DCMS should contribute to the Regional Growth Fund and should work with Local Authorities and arts, culture and heritage funders as essential partners in this cluster development to ensure that cultural, social and economic value is maximised.

2. We urge the Government to accelerate reform of local government finances to implement the recommendations made in the recent Core Cities report.[174]

3. Local Enterprise Partnerships (LEPs) must be required to have Cultural and Creative Industries representation on their boards.

4. All Cultural and Creative Industries in receipt of public funding, including Public Service Broadcasters, must be required to take responsibility for supporting Cultural and Creative Industries regional growth through co-creation and production, sharing of digital distribution, greater physical presence in the community and support for fundraising and new business models.

5. All new cultural infrastructure proposals should be multi-functional and include a strategy to develop a thriving public space that responds to a wide range of needs and public functions. All residential planning proposals must provide for the cultural and heritage needs of their locality.

6. HEIs should develop national and locality-based partnerships with the Cultural and Creative Industries in their region to develop a concerted approach to local cultural, social and economic development. In the face of sharp reductions in Local Authority funding, many HEIs across the country have already stepped in to preserve cultural assets in danger.[175] HEIs should develop long-term commitment and strategies to position themselves as beacons of civic and cultural engagement and as a resource for the local community by offering access to facilities, skills and new avenues of funding.[176]

7. In order to contribute more actively to urban growth, local arts, culture and heritage organisations must regard themselves as partnership builders and actively make connections with schools and HEIs. They must initiate conversations with headteachers, investors, local government and LEPs.

8. Where building-based cultural organisations are in receipt of public funding they should be expected to provide shared gathering spaces for their local communities. The wider Cultural and Creative Industries should also aim to develop and prioritise their potential to offer their buildings as public meeting and creative places to strengthen relationships with the local community and potentially develop new audiences.

6.3.2
Promoting regional equity

Measures must be taken by DCMS, in partnership with DCLG, to reduce the discrepancy between the cultural offer in the regions and that in the capital.

1. An agreed methodology must be found for the measurement of the value of public spending per audience member, which is assessed on excellence, equity and regional distribution and allows for the different costs of various art forms.
2. DCMS and Arts Council England should consider a future in which significant national organisations have a key responsibility for developing and delivering regional strategies to ensure that their value is distributed equitably across the country.

Section 6 Endnotes

153 Liverpool attracted 9.7 million additional visits during its time as EU Capital of Culture, generating and economic impact of £753.8 million.

See: Garcia, B., Melville, R. & Cox, T. (2010) *Creating an Impact: Liverpool's experience as European Capital of Culture*. Liverpool: University of Liverpool and Liverpool John Moores University. Available from: https://www.liv.ac.uk/impacts08/Papers/Creating_an_Impact_-_web.pdf.

154 Northern Ireland Tourist Board (2013) *Perceptions of Derry-Londonderry: UK City of Culture 2013*. [online] Available from: http://www.nitb.com/Portals/2/SharePointDocs/2644/UK%20City%20of%20Culture%202013%20research%20feedback.pdf.

155 See: http://www.corridormanchester.com/welcome.

156 See: Creative Industries Council (2014) **Create UK: Creative industries strategy*. London: Creative Industries Council UK. Available from: http://www.thecreativeindustries.co.uk/media/243587/cic_report_final-hi-res-.pdf.

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http://www.techcityuk.com/.

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160 See: https://www.gov.uk/government/collections/local-authority-revenue-expenditure-and-financing.

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