The Creative Industries Policy and Evidence Centre (PEC) representation for the 2021 Spending Review

Introduction

The UK's creative industries - from film to fashion, and from video games to the performing arts - are integral to local communities throughout the country. This is in part because of the economic importance of the sector: one in eight UK businesses are part of the creative industries, and together they contributed almost £116 billion in GVA in 2019, growing twice as fast a the rate of the UK economy as a whole in the past decade (DCMS, 2021). Prior to the COVID-19 pandemic, the creative industries accounted for 2.1m jobs (DCMS, 2020).

This Comprehensive Spending Review gives the government an opportunity to stimulate growth in a world-leading sector many parts of which have been severely affected as a result of the pandemic. In this submission we highlight three different policy areas where recent PEC evidence suggests policy change is needed.

As with all Spending Review representations the AHRC-funded PEC makes to the government, this briefing should not be read as a "manifesto for the creative industries" covering all areas where support is needed, but rather, specific areas where our evidence strongly points to action that would help grow the sector. Other representations that cover the entire creative industries agenda include those put forward by the Creative Industries Council and Creative UK.

This submission covers the following areas:

- Innovation-led recovery: R&D & Artificial intelligence,
- UK-wide investment,
- Creative workforce: Supporting Self-Employed creatives, Social Mobility, & Immigration.

Full links to the PEC research referenced in this representation can be found at the end of this paper.

1. Innovation-led recovery

The COVID-19 crisis has caused havoc for the operating models for many parts of the creative industries, so investing in innovation to help assist its long-term recovery is a priority. There are also significant opportunities for investment. For example, the UK is a global hub for CreaTech activity, and there is a growing recognition of CreaTech's importance for driving economic growth and innovation. Creative innovators have responded to the challenges and opportunities created by the COVID-19 crisis, with PEC research estimating that 39% of publicly funded CreaTech R&D projects started in 2020 mention terms related to Covid-19 in their abstract compared with 11% of non-CreaTech projects.

The Government has a target of investing 2.4% of GDP in R&D by 2027, with the aim of boosting the UK's innovation performance, increasing to 3% thereafter. The UK economy is 80% service-based. This contains within it fast growing, internationally competitive sectors like the creative industries. Understanding and measuring R&D in the services sector in particular, with its origins in Arts, Humanities and Social Sciences disciplines may have vital significance for the 3% target, and for the direction of policies to address market failures, promote innovation and economic growth.

A wider scope for the definition of R&D across Government which recognises the critical role of R&D in the arts, humanities and social sciences, as recognised in the OECD's Frascati definition

In the run up to the 2019 general election, the PEC and Nesta recommended that the government should use a wider definition of R&D in its tax incentives in order to incentivise innovation in high-growth sectors like the creative industries, not just manufacturing and pharmaceuticals.

Policy recommendations: *In June this year, the Treasury consulted on its R&D tax reliefs. In the PEC's submission to the consultation we recommended that:*

- *Creative firms would benefit substantially from more targeted advice from the HMRC, with specific guidance, supported by case studies and schematics, as to what does and does not constitute qualifying expenditure in creative industries R&D.*
- *Targeted training should be given to HMRC tax inspectors on how to distinguish between qualifying and non-qualifying expenditure in the case of creative industries R&D.*
- *The Government should amend its definition of R&D for tax relief purposes so that it follows the OECD's Frascati Manual in recognising R&D in the Arts, Humanities and Social Sciences (AHSS), bringing the definition into line with the large number of countries that already do so, including Austria, France, Germany and South Korea.*
- *BEIS should drop the explicit exclusion of AHSS projects from its guidance, and thereby acknowledge that the definition of 'science' includes the systematic study of the nature and behaviour of the physical and material universe, humankind, culture and society*

Our research highlights that without the right definitions and tools to measure R&D, and effective policies in place to support it, the Government risks ignoring the full value of R&D in the UK economy, and missing out on incentivising investment in innovation in AHSS-related sectors and activities. Rectifying this would mean that AHSS-related sectors could more easily contribute to the Innovation Strategy's R&D objectives of 'boosting private sector investment across the UK economy, creating the right conditions for businesses to innovate and giving them confidence to do so'.

The recent UK Innovation Strategy which committed to increasing direct public expenditure on R&D to £22 billion per year makes the outcome of the Treasury consultation on R&D tax relief all the more important. More generally, we recommend that public investment in R&D seizes the opportunity to encourage R&D in the creative industries, which are a strong source of UK competitive advantage and have also been hard hit by COVID-19.

Investment in a UK centre for Artificial Intelligence (AI) in the creative industries

The PEC's work demonstrates the UK's dual strengths in the creative industries and in AI research. It has also shown that the UK's levels of AI research involving direct creative industries applications are low relative to other countries.

There are clear reasons why new developments in AI are likely to affect the creative industries:

a) AI techniques routinely influence what music, text and film we consume. YouTube, Spotify, Amazon and many other platforms use AI techniques such as machine learning to recommend creative content, and this trend will increasingly spread to the online offer in fashion and physical products across the retail sector as more consumption moves online.

b) AI can be applied across creative industries. Digitalisation means pictures, sound and text - the bread and butter of the creative industries - can all become data and be analysed using machine learning.

c) New creative applications of AI are already happening. More recent AI breakthroughs such Generative Adversarial Networks (GANs) and Style Transfer are already beginning to be used successfully in film, fashion, design, music and art among other areas.

Policy recommendation: *We recommended that the Government supports an AI and Creative Industries Centre within the context of its broader AI ambitions, to provide:*
a) Training and skill development in AI for the creative industries
b) A gateway to research and development (R&D) in AI for the creative industries
c) Commercial development for AI creative startups

A UK AI and creative industries centre could therefore provide the UK with an opportunity to realise the commercial potential of the synergies between two areas of strategic economic importance (as identified by both AI and the creative industries having sector deals in the 2018 industrial strategy), and conversely reduce the risk that developments in AI elsewhere undermine the UK's position in the creative industries. The UK has in some ways under-invested in the application of technology in the sector as illustrated by the fact that of the 75 UKRI Centres for Doctoral Training (CDTs) announced in 2019, the only centre focussed on the creative industries is the centre in Intelligent Games and Game Intelligence (IGGI).

This recommendation has the strong support of industry and research stakeholders. For example, in an open letter in support of the centre signed by leaders in the creative and tech sectors including Google, WPP, Double Negative, XL Recordings and the National Gallery, and separate letters from research experts in the University of Arts London and the University of Edinburgh. This pilot would also support other pioneering work such as the AHRC's Boundless Creativity campaign in demonstrating the role of the creative industries in stimulating innovation and would fit naturally into the plans for Turing 2.0.

2. UK-wide investment

The PEC's research suggests that the creative industries can play a major role in 'levelling up' the UK economy. The creative industries have large, positive multiplier impacts: over a twenty-year sample period, on average each creative job added at least a further 2 non-tradeable jobs in the local economy compared with 0.3 non-tradeable jobs added for each tradeable job more generally. There is also evidence to support a range of interventions (outlined below), which, if included in policymakers' approach to local growth, could help to support the creative sector to flourish.

Recent PEC research has identified micro-clusters which contain within them particularly dynamic and resilient creative businesses at the hyper-local level (defined as being where a group of more than fifty creative businesses are in close proximity). Significantly, these are found right up and down the length of the UK, from the Shetland Islands to Cornwall - not just in the big cities. Co-locating in either clusters or micro-clusters appears to have a number of advantages for creative organisations including shared access to creative talent, clients, collaborators and researchers. Clusters made up of multiple creative sub-sectors have additional benefits, including a greater likelihood of hosting CreaTech activity. The UKRI Clusters+ programme, innovation funding and associated DCMS scale-up activity would offer precisely this level of regional concentration and investment.

Importantly, PEC research confirms that the UK Government's COVID-19 support schemes such as the Coronavirus Job Retention Scheme, Self-Employment Income Support Scheme and Cultural Recovery Fund have played a vital role in supporting the resilience of creative businesses and the workforce during the pandemic. However, echoing concerns in the economy more widely, it is also the case that many of these businesses will still be benefiting from government COVID-support schemes at the time of writing, and may be at a high risk of failure over the next year as the schemes are withdrawn, particularly in badly affected sub-sectors and localities where consumer confidence remains low.

Policy recommendations: *The UK Government should support next steps for the ambitious AHRC-led Clusters+ programme and their sector-wide infrastructure investment, which together will strengthen the linkage between the R&D ecosystem, company growth, and productivity. This proposal has been devised in collaboration with the Creative Industries Council and has cross-industry support.*

As policymakers deliberate on the impact on UK industry as temporary COVID-19 support schemes are withdrawn, they must carefully consider the differential impacts on creative organisations and their local areas.

Place-based investments such as the Levelling Up Fund aim to support "*infrastructure that improves everyday life across the UK*", and this Fund in particular acknowledges the important role that cultural and heritage infrastructure can play. PEC and Nesta research applying HMT Green Book-endorsed economic valuation techniques shows just how much value the UK public attaches to its cultural and heritage institutions (here, here and here), while other research commissioned by the PEC demonstrates the role they play as 'anchor' institutions in local creative economies. The DCMS and AHRC's ongoing work on the Culture and Heritage Capital Framework will reinforce these findings.

However, the economic development needs of the creative industries are not solely bricks and mortar. A lack of access to high quality digital infrastructure, leading to internet connectivity issues, looms large in the list of barriers to growth identified by creative businesses in clusters. As do access to finance, business support and wider skills needs as key areas of focus. PEC research in partnership with the Creative Industries Council, and the AHRC/DCMS Boundless Creativity report both identify technical (including ICT skills) and management skills as areas where the sector has significant skills issues across the UK.

Analysis from PEC researchers working with the Centre for Cultural Value shows that whilst the Cultural Recovery Fund was distributed evenly across the Government's three Levelling Up priority areas, localities with lower levels of deprivation, more flagship cultural institutions and larger numbers of Arts Council National Portfolio Organisations (NPOs) received more investment per head. This suggests that strong cultural institutions play an important role in attracting emergency funding, but also points to the potential for any future funds associated with Covid-19 recovery to reproduce structural, place-based inequalities.

Policy recommendations: *The UK Government's Levelling Up Fund is primarily focussed on capital investment, but with the Levelling Up White Paper set for publication this Autumn and the design of the UK Shared Prosperity Fund yet to be finalised there are further opportunities for the UK Government to ensure the needs of the creative sector, including in skills and business support, are fully recognised in its local growth agenda.*

It will also be important that as BEIS makes investments in business support through the Help to Grow programmes, delivery is adequately tailored to different types of businesses. Interventions like the Creative Industries Scale-Up Programme have helped to develop and test new approaches to supporting small and micro businesses, and this work continues to be valuable. Further programme activity should make use of robust evaluation techniques, such as randomised controlled trials as BEIS has pioneered through the Business Basics Fund.

A strong local economy and networks are important factors in the success of the UK's creative industries, as reflected in UKRI's Clusters+ model. PEC and Centre for Cultural Value research indicates that where culture and creative industries are embedded in industrial and economic strategies, and have local and combined authority support within associated directorates, local and regional strategies have a significant part to play in the visibility, inward investment and growth of the creative industries.

One potential lever is local procurement. Changes to procurement rules for anchor institutions like museums and hospitals to prioritise local suppliers were made in 2012 in Preston (an intervention which has become known as 'the Preston Model'). Seven years on, research commissioned by the PEC finds that local anchor institutions now account for 9% of turnover for creative businesses in the local area. The research also suggests an increase in demand of £1 million for the Lancashire creative sector had likely produced an overall boost to the local economy of around £1.47 million as a result of multiplier effects.

Policy recommendation: *Where local policymakers are considering changing procurement rules for anchor institutions they should consider how they can build on the existing 'Preston Model' to ensure that micro businesses can take advantage of procurement contracts and build relationships with anchor institutions, and that the programme is adequately publicised to local creative businesses.*

3. Creative workforce

Supporting self-employed creatives

In May of this year, the PEC published two weeks of research and policy to further the understanding of creative freelancers. One of the distinctive features of the creative industries is their high reliance on freelancers - whether that is in film, design, CreaTech or the arts. 32% of the creative industries workforce as a whole is self-employed (including freelancers), compared with 16% of the UK workforce (Oct 2019 - Sept 2020, DCMS, 2021). In some sub-sectors, for example music, performing and visual arts, the numbers are over 80%. There are several reasons why this is the case. The creative industries function by nature on the basis of "project-based production systems", where different skills are required for different productions and creativity benefits from collaboration and access to networks. Yet, despite being an essential and growing part of the workforce, creative freelancers are poorly served by many parts of the policy infrastructure.

Whilst a significant amount of data is collected by governments on employment status there is still limited evidence on the complex working practices and business models of the self-employed, as highlighted in our commissioned work from Coventry University on the 'Contribution and Challenges of Creative Freelance Work'. This means that policymakers struggle to understand the impact of their reforms on a diverse group of people.

It is vital policymakers investigate the socio-economic origin, gender and ethnicity, as well as age, disability and caregiving responsibilities of those who are no longer in work due to the pandemic. Research by the Centre for Cultural Value in partnership with the PEC has also uncovered how unequally the costs of COVID-19 have been borne across different groups. It showed that the number of freelancers working in creative occupations aged 25-29 and 40-49 saw particularly steep declines (from 30,000 to 20,000 and 50,000 to 38,000 respectively during 2020).

In recent years, policymakers have acknowledged the need for lifelong learning programmes to support career development from playground to pension. Despite this, skills policies have not often been aimed at the self-employed workforce.

The success of sector-specific programmes such as the bespoke trainee schemes in the Scottish screen sector contrasts with the difficulties the sector has had in adapting economy-wide programmes like the apprenticeship levy. These include issues around duration of placement, requirements around on-the-job training and capacity to provide necessary support, as described in the PEC's evidence synthesis on skills, talent and diversity. The new flexibilities on apprenticeships are a big step forward, showing a recognition of the particular challenges faced by the sector, which we hope will now be applied in relation to other programmes.

Policy recommendations: The *UK Government should consider calls for a Freelance Commissioner to build more resilience in the UK's self employed workforce. One of the primary ambitions of this Commissioner would be to ensure that Government policies are fit for purpose for freelancers. The second priority should be to improve national data collection on types and structures of self-employment and ensure relevant data is being collected on operational structure and contract numbers. This data should be standardised across different government departments to give policymakers the information they need to enact better policy. In order to do this they would need to be able to make cross-Whitehall recommendations and so this position should ideally sit between the Prime Minister's Office and the Treasury.*

Across the UK, no national or UK-wide skills policy should be written without fully recognising the structures, opportunities and limitations of freelance work.

Whilst the UK Government's 'Plan for Growth' mentions the UK-wide supports for self-employed people during the COVID-19 pandemic, it will be critical to ensure that the skills interventions that are mentioned like 'employer-led skills bootcamps' do not disadvantage those sectors that are most reliant on freelancers. Forthcoming PEC research publications will develop more specific recommendations for an all-age lifelong learning strategy and the right system incentives for engagement.

Social mobility

Research using the latest data from the Labour Force Survey suggests that, in 2020, over half (52%) of the Creative Industries workforce were from professional or managerial socio-economic origins, compared with 38% across all industries. Access to culture in the UK is also highly unequal and stratified by social class, and this begins in early years education. Data from the Taking Part survey suggests that those from working class backgrounds are far less likely to engage in many of the cultural activities that are funded and supported by government.

Cultural consumption amongst young people growing up in working class households contrasts strongly with those from affluent middle class origins who dominate work in creative occupations. This difference is part of the reason that those from more privileged backgrounds are more likely to be considered a good 'match' when interviewed for jobs or commissioned, or informally connected, with those already working in the sector. Whilst many solutions rest with industry, levelling up early life experiences and ensuring fair and equal access to cultural education is key for the future creative workforce.

Policy recommendations: *Level up early life experiences – ensure fair and equal access to culture and cultural education; and build an awareness of the breadth of roles available and a sense that there is a career for everyone in the creative industries, irrespective of their background:*

- *Extend, expand and actively target the Creative Careers Programme towards social mobility cold spots and embed the programme within local skills systems.*
- *Commission a Social Mobility Taskforce for the Creative Industries to spearhead industry leadership to promote socio-economic diversity and inclusion.*

Unlock the potential of education as the great leveller – policymakers should widen access to higher education, open up technical routes in to the industry, and ensure a valuable and enriching educational experience that prepares all students for work in creative roles:

- *Offer a new, long-term financial settlement for cultural education, with enhanced funding and resources for arts and culture in schools.*
- *Fund the Arts Premium for the next fiscal cycle and extend it to include primary schools in DfE Opportunity Areas and social mobility cold spots.*
- *Undertake a full, forward-looking review of technical learning pathways in the Creative Industries, including college-based and work-based routes.*
- *Invest in a 'Future Leaders Fund' - a challenge fund to provide flexible grants for professional development and leadership programmes targeting mid/late career creatives from (socio-economically) diverse backgrounds.*

Immigration policy

PEC and Creative Industries Council research has shown that, unlike the rest of the economy, the most severe skills shortages within the creative industries are in high skilled occupations such as programmers, software developers, architects, and designers. These roles are also very likely to be dominated by the self-employed: prior to Brexit, we estimated 10% of employers in the creative industries had hired a freelance worker from the EU in the past 12 months.

Despite evidence on the importance of EU freelancers to UK creative businesses, the UK's post-Brexit immigration system currently has limited pathways of entry for skilled freelancers, unless they are deemed 'exceptionally talented' or have a significant amount to invest in a new business.

With the Government now looking to introduce a number of routes for skilled and entrepreneurial freelancers, there may be an opportunity to limit damage to the creative industries from this focus on full-time employment status.

Policy recommendations:

High Potential Individual Visa

The new High Potential Individual Visa route announced in the UK Government's Innovation Strategy is set to offer visas to those who have graduated from academically elite universities. Because it will not be reliant on employment status, it may prove vital to groups that are poorly served by our immigration system: freelancers and entrepreneurs. But the design sector, despite being in theory the perfect fit for this policy - being a priority sector in the Innovation Strategy and with a highly educated workforce where one in two are self-employed - will not benefit from this route unless changes are made. This is because top design institutions like Parsons School of Design in New York are relatively small and specialist, and very unlikely to feature on any generic list of top global universities. In fact, only one of the top 10 global design institutes are represented in the QS list of the top 50 global universities (MIT). Design is also one of only five subjects where none of its top 3 Higher Education Institutions appear in the overall top 50. This means that if a ranking like QS is used, without a supplementary list of specialist institutions, then the design sector is unlikely to benefit.

To include a specialist list of design institutions would not only benefit the sector but could also have positive repercussions for the upcoming cross-Whitehall UK export strategy as not only is the design sector an important service exporter itself, but investment in design also improves a company's abilities to export (Yu, 2021).

The Global Talent Visa

The 'Global Talent Visa' also offers an important opportunity to ensure that skilled freelancers are able to work in the UK - using awards to recognise exceptional talent regardless of whether that individual is self-employed or in full-time employment. Currently, the awards that are recognised relevant to the creative industries are those pertaining to writing, film, visual art, music, theatre and fashion design. Although this Visa is unlikely to be able to provide the number of people needed to address significant skills shortages, policymakers should consider opening a consultation period with the sector to ensure that relevant awards relating to areas like product design, advertising and games are also included.

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About the PEC

The PEC is part of the Creative Industries Clusters Programme led by the Arts and Humanities Research Council (AHRC) and funded through the Industrial Strategy Challenge Fund. We provide independent research and authoritative recommendations to aid the development of policies for the UK's creative industries, contributing to their continued success. We do this by asking some of the best researchers across the UK the most pressing questions about the sector.

The PEC is led by Nesta, the innovation foundation, and involves a UK-wide consortium of universities. They are: Birmingham, Cardiff, Edinburgh, Glasgow, London School of Economics, Lancaster, Manchester, Newcastle, Sussex, and Ulster.

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