CREATIVE FURTHER EDUCATION in the four UK nations

Heather Carey, Lesley Giles and Ben Hickman (Work Advance)

July 2024

Creative Industries Policy and Evidence Centre

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About the Creative Industries Policy and Evidence Centre

The Creative Industries Policy and Evidence Centre (Creative PEC) works to support growth of the UK's creative industries through the production of independent and authoritative evidence and policy advice. Led by Newcastle University with the Royal Society of Arts and funded by the Arts and Humanities Research Council, Creative PEC comprises a core consortium of Newcastle University, Work Advance, the University of Sussex and the University of Sheffield.

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About the State of the Nations reports

The Creative PEC's 'State of the Nations' series analyses the latest data across four thematic areas to inform the development of policies relating to the creative industries. Their scope is the whole of the United Kingdom, and wherever possible data is presented for all the nations and regions.

Regular reports on each area will be published annually over the five years of the Arts and Humanities Research Council (AHRC) funding. The themes and corresponding Research Partners are:

- R&D, Innovation and Clusters (University of Sussex)
- Internationalisation (Newcastle University)
- Arts, Culture and Heritage Sectors (University of Sheffield)
- Education, Skills and Talent (Work Advance).

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The views expressed in this report are solely those of the authors.

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Citation

Giles, L., Carey, H. and Hickman, B. (2024) 'Creative Further Education in the Four UK Nations', Creative PEC State of the Nations Research Series. United Kingdom: Creative Industries Policy and Evidence Centre (Creative PEC). doi: 10.5281/zenodo.12532918.

Report design

Mike Green, Green Doe Graphic Design Ltd.

CREATIVE FURTHER EDUCATION in the four UK nations

State of the Nations research series

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Foreword

There are few policy areas more vital to the creative industries than Education, Skills and Talent. The creative industries are a varied and heterogeneous group of sub-sectors, including household-facing ones such as music, video games, performing arts and film, and business-facing ones like advertising, software, architecture and design. What binds these together is their specialised employment of skilled creative talent.

Skills is a devolved responsibility for the four nations that make up the United Kingdom and is also increasingly so at the sub-national level. This is a good thing, because skills policy should address local needs and be attuned to local industrial contexts, which themselves can vary greatly.

But without central efforts to coordinate data collection, evidence-based policymaking is challenging. A lack of standardisation makes it difficult to see the wood for the trees, to monitor trends, make comparisons between different parts of the skills system, evaluate what is working and what needs to be changed.

For this reason, pulling together this report on creative further education (FE) has been like crafting a patchwork quilt, using data from a breathtaking thirty-one sources from eight different agencies.

We've learned among other things that FE enrolments in creative subjects are declining in all four nations making up the UK even more

sharply than FE enrolments in other subjects. The picture of FE attainment and outcomes is complex and messy, with significant variations across subject area and nation. A policy focused on simply growing learner numbers will not be enough.

The devolutionary turn in skills policy is likely to see a further boost in England with the election of a new government in Westminster. This is to be welcomed. But the change in government also marks an opportunity to reset how we approach education and skills data across the UK, with greater coordination and, where appropriate, standardisation. In the meantime, Creative PEC will, through these State of the Nations reports, continue to mine the different data sources to present as consistent an assessment of the UK's creative industries as possible. As ever, we'd love to hear your comments and suggestions!

**Professor Hasan Bakhshi,
Director, Creative PEC**

Executive summary

The first State of the Nations report from the Education, Skills and Talent theme explores the scale and nature of creative further education (FE) in the four UK nations.[1] Building on the existing evidence base, the analysis takes a fresh look at creative FE through the lens of five core dimensions. These are: participation in creative FE; trends over time; spatial patterns of learning; the profile of learners; and learner outcomes and destinations. In what is a fragmented system, defining FE, its qualifications and providers is not a straightforward task, especially given the variability across nations.

Indeed, a core intention of the research has been to capture the distinct policy context in each nation, exploring differences in qualifications, sectoral definitions and the changing picture of data availability. At a time when there is a growing call for lifelong learning to meet the changing demands of a modern creative economy, the analysis provides a more comprehensive perspective of the future creative talent pipeline, extending earlier research concerning HE. Its focus is intentionally, principally, on the supply side, to highlight policy priorities. It also offers insights about where steps need to be taken to strengthen the currently fragmented evidence base to track patterns of creative FE in future: in total, thirty-one data sources, from eight different agencies were used.[2]

We report five key findings from our work across the different national skills systems (see page 6).

Summary of findings

1. **Creative FE enrolments are declining in all parts of the UK, and at a faster rate than average across all subject disciplines**. The reductions are severe, both in terms of their pace and the scale of losses: a reduction of over 220,000 enrolments in creative FE (education and training, 19+) in England over the past decade; over 4,500 fewer creative (full-time equivalent) students at colleges in Scotland; nearly 6,000 fewer regulated creative enrolments in Northern Ireland over the past five years alone; and over 65,000 fewer creative FE learning activities in Wales. Although this aligns with broader trends in FE provision, the falls in participation are greater in creative subjects.

2. **Despite the recent focus from policymakers across the UK, apprenticeship take-up remains very low in the creative industries in all four nations**. The share of all apprentices studying frameworks or standards aligned to the creative industries ranges between 1.7% (Wales) and 8.7% (England). Further, the apprenticeships picture is dominated by Information and Communications Technology (ICT). Although this reflects growing demands for digital skills across the economy, it does also mean that apprenticeship numbers in other creative disciplines (e.g. creative arts and design) are very low indeed. Furthermore, any growth has also been almost entirely driven by expansion of ICT apprenticeships. In absolute terms, the increased number of creative apprenticeships pales in comparison to the reduction in other (i.e. college-based) creative FE and training.

3. **Creative FE is highly concentrated in urban cities and regions** – Glasgow, Edinburgh, Belfast, Cardiff, Swansea, London, the South East, the West Midlands – with much more limited provision in rural areas and regions such as the North East of England; Argyll & Bute, the outer Hebrides and the Shetland Islands; parts of North Wales and the Welsh Valleys; and the Northern and Southern Assembly areas of Northern Ireland. This suggests that learning options may be both a casualty of and a contributor to the spatial patterns of the creative industries (further discussion on the geographies of creativity can be found **here** – Siepel, Ramirez-Guerra, & Rathi, 2023).

4. **Retention and achievement rates vary across creative disciplines and UK nations**. In Scotland, FE achievement rates are below average for college students studying all creative subjects, although achievement rates for Modern Apprenticeships are above average (though largely driven by IT and Telecommunications). In Northern Ireland, Wales and England, achievement rates are higher among enrolments on Arts, Media and Publishing courses but for Languages, Literature and Culture, this tends to fall below the all subject average. Further, the data suggests that achievement rates in creative FE (as for wider areas of learning) have been negatively impacted by Covid-19 and are yet to return to pre-pandemic levels.

5. **The data we have on the sociodemographic profile of learners in creative FE in each UK nation highlights room to improve diversity and widen access**. Indeed, it suggests that creative learners tend to be less ethnically and socioeconomically diverse than the wider FE student population. The research also echoes broader research in finding a significant gender imbalance in IT and software, with the vast majority of those studying FE courses in these disciplines being male. In contrast, we find a higher proportion of those studying creative disciplines are disabled, have a health condition and have learning difficulties.

Research insights and policy considerations

With these findings in mind, the research sets out some important policy considerations. **Firstly, the research has highlighted some of the delivery challenges associated with reforming FE within the different national skills systems across the UK**. While we have identified common strategic objectives, principles and design features driving skills reforms in each of the nations, they are not straightforward and will take time to deliver. Positively, the reforms point to a consistently strong commitment to strengthening FE, not only as a route to HE, but also as a pathway into employment and to support ongoing upskilling and reskilling and career progression.

There has also been a consistent focus on enhancing the range of provision and participation in industry-facing technical education, especially for priority sectors, and the creative industries is seen as a priority in each UK nation. In that context, policy goals seek to enhance the responsiveness of these skills programmes to changing labour market needs, and with stronger employment prospects, this aims to raise learner engagement. However, despite the policy intention to date, we see that FE enrolments in creative disciplines have been declining significantly over the past decade in each nation, and any growth in apprenticeships has been insufficient to offset this: further steps will need to be taken to change this position.

The sector strategies dedicated to the creative industries in each nation provide an opportunity to revisit policy and funding priorities, reflect more closely on the design and delivery models for different skills and training programmes, and explore room for developing and using a broader range of incentives and communication tools to support greater and wider engagement. This will also need to be an area of ongoing research to better understand the enablers and barriers affecting the trends in creative FE that have been identified (areas for future research are discussed further in the Conclusions).

Secondly, given the mixed picture of achievement and outcomes among different creative learners pursuing the various creative education pathways, this points to a further area for policy focus. Different creative education programmes within FE will have varying delivery models and design features driving differences in student retention, destinations and progression. The variations in outcomes nation by nation identified through the research can provide a basis for further policy analysis, drawing on evaluation evidence where it is available and exploring where modifications could take place, building on areas signalling greater success and hence 'what works'. Furthermore, achievement and outcome measures also give a sense of the quality of different FE courses and mechanisms to enhance the currency and labour market relevance of provision – for example, where and how to encourage the input and use of labour market information and industry insights through strong employer engagement. In particular, it will be important to share lessons where steps are being taken spatially to customise the offer to varying local needs, to encourage stronger partnerships locally among providers and employers to better support growing creative clusters.

Finally, while a further common policy intention across the nations is to enhance the inclusiveness of learning, our analysis of the profile of learners currently studying creative disciplines suggests that there is still some way to go to realise this goal. Although there is well-developed evidence that FE and steps to expand technical pathways, such as with apprenticeships, can promote diversity and inclusion by connecting routes to learning in employment, this is not a guaranteed outcome. It is an area, therefore, that will require ongoing concerted action. As a result, there is still room for the different national governments in different parts of the UK to work together with industry stakeholders, employers and skills providers to consider how to widen access to creative FE opportunities as a basis to ensure a more diverse creative industries workforce in future.

CREATIVE FURTHER EDUCATION in the four UK nations

Trends in participation in creative FE in the four UK nations, 2013/14 to 2022/23

England
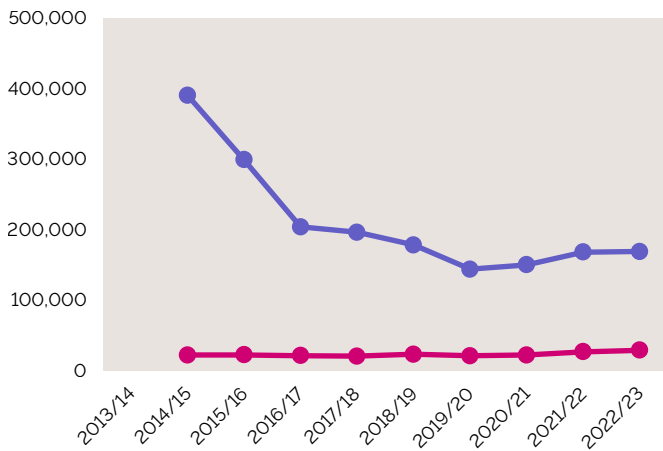
Notes: college-based creative FE refers to enrolments on Education and Training (aged 19+), as defined by DfE. . Creative Apprenticeships are all ages. Creative disciplines defined based on selected Tier 2 Sector Subject Areas.

Scotland
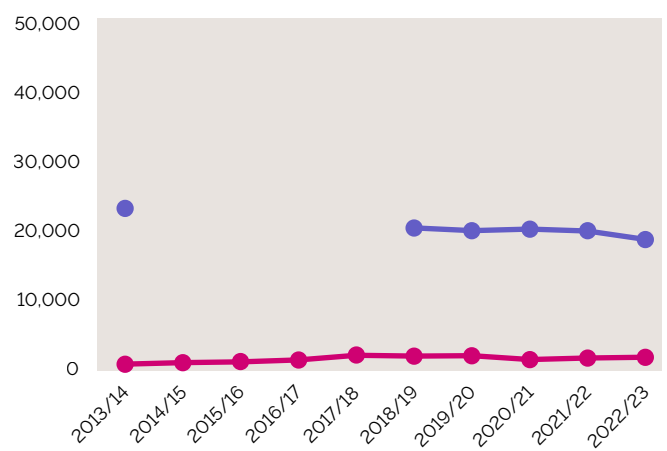
Notes: college-based creative FE refers to Full-Time Equivalent (FTE) Students (all ages) at FE Colleges in Scotland, including work-based learning. Modern Apprenticeships only (all ages). Creative disciplines defined based on selected Superclass codes and MA frameworks.

Wales
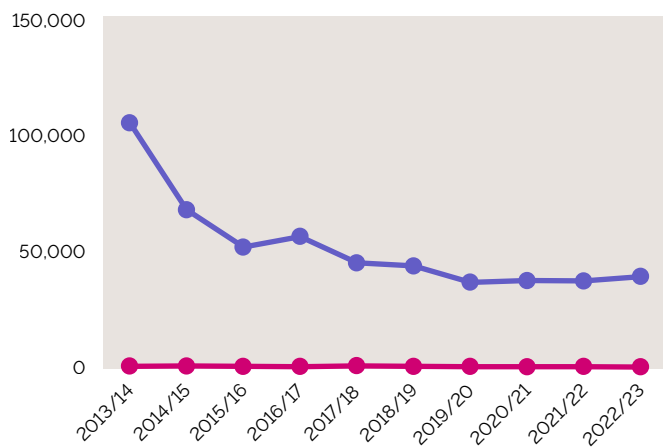
Notes: college-based creative FE refers to learning activities at FE institutions, including work-based learning provision (all ages). Creative Apprenticeships are apprenticeship learning programmes with FE institutions and other training providers (all ages). Creative disciplines defined based on selected Tier 2 Sector Subject Areas.

Northern Ireland
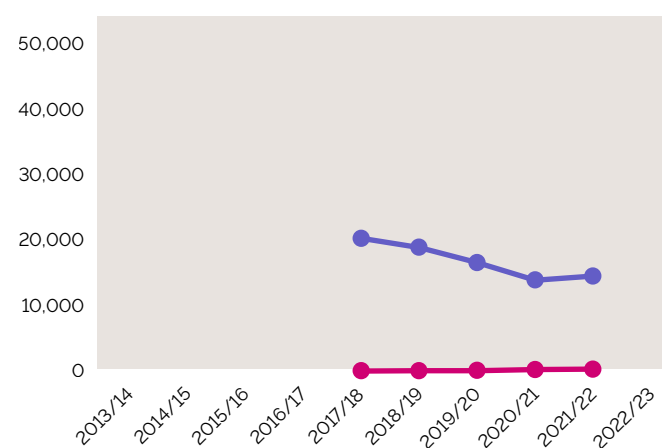
Notes: college-based creative FE refers to regulated enrolments (all ages). Creative Apprenticeships are participants on ApprenticeshipsNI frameworks.(all ages (16+). Creative disciplines defined based on selected Tier 2 Sector Subject Areas and ApprenticeshipsNI frameworks.

● College-based creative FE   ● Creative Apprenticeships

Sources: Authors' elaboration based on data from the Department for Education, the Scottish Funding Council, Skills Development Scotland, StatsWales and the Department for the Economy (Northern Ireland)

Notes: Figures are FE enrolments and apprenticeship starts. Learners may therefore be counted more than once. Data includes FE institutions but excludes FE provision through school sixth forms, HE institutions and private providers.

1 Introduction

1.1: Background context

Employment in the creative industries continues to grow at pace across the UK. In 2023, the total number of filled jobs reached over 2.4 million – up over 700,000 on a decade earlier (DCMS, 2024). Rapid expansion of the sector is forecast to continue, with creative sectors expected to create 300,000 additional jobs over the next five years alone (Creative UK/Oxford Economics, 2021).

The growth potential of the creative industries and their value to the economy has been recognised by the governments in each of the four UK nations. The Chancellor, in his 2023 Spring Budget, identified the creative industries as one of five priority sectors (HM Treasury, 2023), and the recently released creative industries Sector Vision sets out the ambition to grow the creative industries by £50 billion and generate an extra million jobs in the sector by 2030 (DCMS/CIC, 2023). In Scotland, the creative industries are one of seven growth sectors and the Scottish Government's National Strategy for Economic Transformation and associated delivery plans outline its long-term vision and strategy for the sector (SG, 2022). Since 2016, the Welsh Government has progressed distinct actions to support the creative industries in Wales and established a dedicated agency in 2020 within government – Creative Wales – to harness their potential to drive growth of the economy (WG, 2023). In Northern Ireland, Digital, ICT and Creative Industries has been identified as one of five key strategic clusters within its long-term economic strategy, where there is perceived to be greater potential to enhance international competitiveness and for the national economy to be a global leader (Department for the Economy, 2021).

Each of these strategies acknowledges that the rapid expansion of the creative industries places a high priority on skills and includes a wide range of activities to develop the skills needed to support future success. The creative workforce is highly skilled, with 95% of creative occupations being higher-skilled roles[3] compared to 46% of workers generally in the economy (Giles, Carey, & Spilsbury, 2020). Nearly three quarters (73%) of those employed in creative occupations are degree-educated (only 44% of those working across all industries are as well qualified). Although strengthening both education and skills pathways into the creative industries are seen as key priorities across the UK, and especially technical options such as apprenticeships, reform programmes are harder to deliver in practice (Carey; Giles; O'Brien, 2023).

In a rapidly changing future economy, therefore, many parts of the creative industries are already facing acute skills shortages, and there are concerns that these are increasing (Bakhshi & Spilsbury, 2019; Giles, Carey, & Spilsbury, 2020). A recent report by the House of Lords Communications and Digital Committee drew attention to these tensions, concluding that the future success of the creative industries was at risk, despite the proposed programme of education reforms, in part because there will still be challenges in equipping learners with the skills needed by creative employers and incentivising people to take creative pathways – now and in the future (House of Lords Communications and Digital Committee, 2023).

We still lack a regular, robust and coherent source of intelligence on the pipeline of talent to the creative industries and education pathways into and through the industry. This is despite the regular production of labour market intelligence for the creative industries in some nations (such as the Skills Development Scotland quarterly Sector Skills Assessments), recent developments such as the Unit for Future Skills dashboards in England, and research by a wide range of trade bodies in different creative sub-sectors. The current evidence base, therefore, remains patchy and fails to provide a coherent and comprehensive picture that tracks progress overtime, aligned to skills reforms. The research of the Creative Industries Policy and Evidence Centre (Creative PEC) over the next five years seeks to address these information and knowledge shortfalls.

1.2: Research aims and approach

The first State of the Nations report on the Education, Skills and Talent theme explores the scale and nature of creative further education in the four UK nations. This seeks to build on earlier research concerning HE.

Throughout the study we define further education (FE) as any study after secondary education that is not HE delivered by HE institutions (i.e. universities). This includes both academic qualifications and technical and vocational education and training. FE can be provider-led (i.e. delivered by a college) or work-based (i.e. apprenticeships). Figure 1.1 provides a simplified conceptualisation of different parts of skills systems and the scope of this research.

While this is our conceptual definition, it is important to note that the statistical definitions used throughout are impacted by the availability of data in each UK nation. For instance, the publicly available data sets presented in this report are constructed from data returns made by individual colleges and hence present a picture of the FE sector. Colleges offer a wide range of both academic and vocational qualifications across a range of levels, from pre-access or entry courses to higher, degree-level study. Indeed, colleges are the main providers of higher vocational/technical qualifications, such as Higher National Certificates, Higher National Diplomas and foundation degrees. The data does, however, exclude FE delivered by school sixth forms, universities or private providers.

Given the devolved nature of skills policy, the skills system varies considerably in UK nations, each of which has a very distinct policy context, differences in qualifications and qualifications frameworks, alternative sectoral definitions (including for the creative industries) and considerable differences in data availability and variable definitions. The standard classifications of subject disciplines also do not align well with creative occupations or industries. We encourage readers to review the detailed data notes included throughout this report.

Figure 1.1: Defining the scope of the research

		FURTHER EDUCATION SECTOR		
		Provider-led	Work-based	
PRIMARY SCHOOL (AGED 4-11)	**SECONDARY SCHOOL (AGED 11-16)**	**ENGLAND** A Levels / T Levels / Certificates / Diplomas / Higher Vocational Qualifications	Intermediate Apprenticeships / Advanced Apprenticeships / Higher Apprenticeships	**HIGHER EDUCATION INSTITUTIONS (E.G. UG/PG DEGREES, DEGREE /GRADUATE APPRENTICESHIPS**
		SCOTLAND National Certificates / Scottish Vocational Qualifications / Higher Nationals (SCQF L7 & 8)	Certificate of Work Readiness / Modern Apprenticeships	
		WALES A Levels / Welsh Baccalaureate / Certificates / Diplomas / Higher Vocational Qualifications	Apprenticeships / Higher Apprenticeships	
		NORTHERN IRELAND A Levels / Certificates / Diplomas / Higher Vocational Qualifications	Apprenticeships / Higher Apprenticeships	
		← Research scope →		

Notes: The figure provides a simplified conceptualisation of different parts of skills systems and the scope of the research; statistical definitions used in the report vary by data availability in each UK nation; the report's data reflects individual colleges, excluding FE from schools, universities, and private providers.

While we cannot remove the inherent complexity of skills systems, a core intention of this research has been to provide a more comprehensive picture of the future talent pipeline, bringing together the fragmented evidence base: in total, we used 31 data sources from eight different agencies across the four UK nations. Further, we have taken an approach that acknowledges differences in each nation's skills system, and as such have separate 'deep dives' into creative FE in each of the four UK nations.

In doing so, the research aims to establish a robust, data-led picture of:

1. **the population of creative learners in FE**, including in college-based education and training and work-based learning (i.e. apprenticeships), to understand differences in the balance of different types of provision;

2. **trends in creative FE over time**, where possible establishing a 10-year time series, using the latest data available at the time of data extraction;

3. **spatial patterns of creative FE**, nationally, regionally and (where possible) within different local authorities;

4. **the profile of learners in creative FE**, where possible, by gender, age, ethnicity, disability, socioeconomic background and/or area-based measures of deprivation, to ensure learning opportunities are sufficiently diverse;

5. **learner outcomes and destinations**, including rates of achievement and learner destinations, such as further learning, employment and earnings.

The focus of this report is FE in creative disciplines, which will be relevant to both the creative industries and wider creative economy (i.e. creative jobs in other sectors). The research does not include learning relevant to non-creative occupations in the creative industries, though we recognise this as an important area for future research (see Section 6.3).

The research has adopted a three-staged approach:

Stage 1: Scoping. This included an audit of publicly available data on creative FE in each nation, examining disaggregation by subject discipline, variable and time series availability. The research team also undertook a series of bilateral interviews and roundtables with policymakers in each UK nation and with industry trade bodies and data owners. These discussions informed the project aims and objectives to maximise the value of the research for stakeholders, and they helped us refine the methodology to reflect what was possible given the data available and the timescales for the first State of the Nations report. The scoping phase found the availability and sources of data on creative FE varies from nation to nation, as do the classifications used to describe different subject disciplines and the variable definitions. The sources used are described at the beginning of each section, with further information available in the data reference list that accompanies this report.

Stage 2: Data collection and analysis. The second phase of the work involved data extraction, collation and analysis. Once the data sources, variables and definitions were confirmed, the data were extracted from the various sources and then cleaned and quality assured. A key focus has been to produce a consistent set of tables and charts for each national analysis as far as possible.

Stage 3: Reporting. A key goal has been to produce one overarching reference report that enables an analysis of the topics for each nation, supporting a better understanding of where issues are distinct and where they are common. As such, the main focus of the report has been on examining the core dimensions (outlined earlier) for each UK nation and contextualising these with an assessment of the latest labour market and skills policy developments in that jurisdiction.

1.3: Report structure

This report draws together the various research strands, structuring the evidence around key dimensions:

Section 1 (this section) forms the introduction to the study, sets out the background to the research and its policy relevance, and outlines the aims of the analysis and approach taken.

Sections 2 to 5 provide the assessments for each nation in turn (Scotland, Northern Ireland, Wales and England), examining the extent and nature of creative FE. Each of these sections begins with a summary of the labour market and policy context for that nation. A key focus has been to produce a core analysis around common dimensions and a consistent set of tables and charts, as far as possible, to compare and contrast issues as necessary.

Section 6 draws conclusions, discusses policy considerations and identifies areas for future research, including for Creative PEC's Education, Skills and Talent theme.

In addition to this report, wider statistics from the study have also been brought together in an accompanying set of data tables, available on the Creative PEC website.

2 Creative further education in Scotland

2.1: Labour market and policy context in Scotland

Scotland's creative industries have proved particularly resilient over recent decades despite the pressures of the pandemic and subsequent worsening economic conditions from the cost-of-living crisis.

Between 2013 and 2023, gross value added for the sector in Scotland grew by 2.8% on average each year, compared to growth of 1.0% across all industries. Further, expansion of Scotland's creative industries is projected to continue in the wider economy up to 2033 (SDS, 2023). With nearly three quarters of its workforce qualified to Scottish Credit and Qualifications Framework (SCQF) Level 7 and above, this projected growth is likely to create significant demand for higher skills in the years ahead (SDS, 2023). The creative industries employ a wide range of both creative and non-creative roles, and thus the skills needed will be equally diverse, including both creative and wider technical and transversal skills. Attracting and training young people into creative areas of education will be an important concern, as will how to encourage the upskilling and reskilling of adults already in the workforce.

The current priorities supporting learning among young people and adults within the Scottish skills system are set by the 10-year National Strategy for Economic Transformation, launched in 2022 (SG, 2022). This builds on Scotland's Future Skills Action Plan, launched in 2019 (SG, 2019). The long-term strategic

priorities, and the direction of ongoing skills reforms, have also been heavily influenced by a series of strategic reviews and action plans over the last decade, which culminated most recently in a review of the skills delivery landscape in 2023 – the Withers Review (Withers, 2023).[4]

A core overriding purpose of these reviews, and the reform programme, has been to enable adjustments to the skills system to ensure its relevance in a modern, future-focused world of work and to recognise that education and lifelong learning are important drivers of a thriving, inclusive and entrepreneurial economy. A key intention therefore has been to take steps to ensure the system can support economic transformation – this includes: achieving close alignment between skills provision and labour market needs; supporting and incentivising individuals and employers to invest in skills (i.e. supporting upskilling and reskilling of adults as well as engaging young people); and providing greater coherence and integration across the system so that there are connected education pathways supported by colleges, universities and community-based adult learning at different stages of individuals' learning journeys.

With specific reference to further education (FE) in Scotland, opportunities are mainly provided by a network of 24 colleges and a number of independent training and community learning providers. The management of FE opportunities are overseen by the Scottish Funding Council (SFC) and Skills Development Scotland (SDS) on behalf of the Scottish Government. The SFC largely leads on funding core provision for colleges and universities as well as Foundation Apprenticeships (FAs) and Graduate Apprenticeships (GAs). The SDS leads on Modern Apprenticeships (MAs) and some FAs, and it allocates funding to wider learning providers. Funding is allocated annually to universities and colleges through a series of outcome agreements, overseen by the SFC, and to wider providers via an annual commissioning process run by the SDS for apprenticeships (mainly MAs). The deployment of outcome agreements has enabled moves towards greater regionalisation in the Scottish skills system, as a basis to enhance the responsiveness of skills provision to regional priorities and changing local needs. These are informed by robust skills assessments (i.e. regional and sectoral[5]). A network of Regional Economic Partnerships has also been established to engage wider regional stakeholders, including employers, to develop Regional Skills Investment Plans, with the aim of better enabling employers to shape skills funding allocations regionally, beyond nationally set policy priorities.

This annual funding process supports a broad curriculum FE offer in Scotland. The main learning pathways include academic routes (usually involving national and higher qualifications and pathways through to higher education – HE) and work-based learning (WBL), including apprenticeships and vocational qualifications (such as Scottish Vocational Qualifications,[6] National Certificates, Higher National Qualifications, National Progression Awards, and Skills for Work qualifications). The focus of most publicly funded provision is on attaining nationally recognised qualifications, which are managed and developed by the Scottish Qualification Authority (SQA) – the national accreditation and awarding body for Scotland. Learning options also include broader options for community learning and pre-employment education, as well as wider sector-specific training and in-work reskilling and upskilling.

In the context of the wider reforms, the Scottish Government has been working with its industry and skills partners (e.g. schools, colleges and universities, training providers) to ensure the skills system engages young people at school in creative subjects (such as art, design, languages, music, problem solving) and continues to support their creative education as they progress through FE and beyond (SG, 2019). Furthermore, there have been extensions to WBL, including by widening opportunities for vocational learning, such as through apprenticeships (e.g. by extending FAs and GAs).[7] These programmes also aim to provide options for adults for reskilling and upskilling. In 2022/23, there were just under 240,000 students attending FE colleges, and 43% of those students were 25 or over.

2.2: Participation in creative FE in Scotland

A key first task has been to review the general picture of participation among creative learners in FE in Scotland. This has aimed to view the population of students from different perspectives, including by type (i.e. apprenticeships; education and training) and subject disciplines/areas of learning.

Available data relates to subjects studied by full-time equivalent (FTE) college students at FE institutions in Scotland.[8] The College Statistics Report is published annually by the SFC, with data sourced from their Further Education Statistical return, which is provided by all Scottish colleges. It is not possible to directly map superclass subject titles to creative industries, but Arts and Crafts, Authorship/Photography/Publishing/Media, Information Technology and Information, and Performing Arts are likely to be the four most relevant categories for creative FE. Apprenticeship data is published by SDS. This section presents data for relevant apprenticeship frameworks, but it should be noted that these have changed significantly over time.

In 2022/23, there were just under 19,000 FTE students (all ages) studying various creative courses – equivalent to around 15% of the total learner population (124,654 FTE college students). This was comprised of: 6,958 FTE students studying Information Technology and Information courses; 4,592 studying Arts and Crafts courses; 3,684 on Authorship/Photography/Publishing/Media courses; and 3,597 pursuing the Performing Arts (Figure 2.1). While Information Technology and Information courses represented the highest area of creative demand, this was still some way behind the most popular FE courses such as Health Care (19,265) and Family Care (14,954).

Figure 2.1: FTE college students (all ages) by superclass subject, 2022/23, Scotland
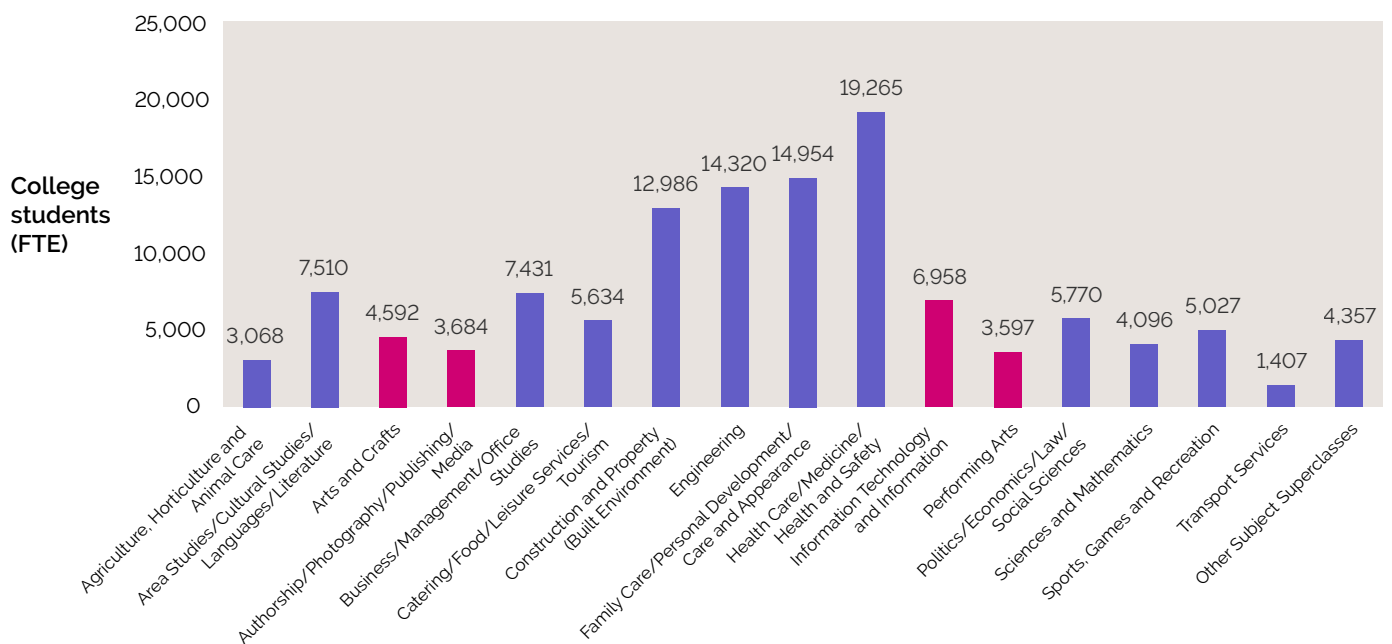
Source: Authors' elaboration based on data from SFC (2024)

Notes: Figures are for students at FE colleges in Scotland. Includes full-time and part-time students (adjusted to FTE) on courses at FE and at HE level delivered through FE colleges, including WBL (e.g. MAs) and introductory/pre-access courses and non-recognised qualifications. Data excludes FE provision through school sixth forms, HE institutions and private providers. Figures for superclass subjects with under 1,000 students have been combined into 'Other subject superclasses' for presentation purposes. Creative disciplines are highlighted in pink.

A review of Scotland's range of apprenticeship programmes provides an opportunity to explore those pathways which secure industry-recognised qualifications and training often while working and earning a wage. There are three broad types of apprenticeship: FAs (for those aged 15 to 18 at the second phase of school, focused at SCQF Level 6); MAs (offered at SCQF levels 4 and 5 up to Level 11); and GAs (SCQF Levels 9 to 11).[9]

The development of apprenticeships is overseen by employers through the Scottish Apprenticeship Advisory Board. The Board's remit spans policy; standards and frameworks; communications; and funding across five groups, including an Employer Engagement Group that tracks employer input into apprenticeships. There is also an employer-led Apprenticeship Approvals Group. Technical Expert Groups are established as short-life working groups in response to demand to co-design content. They are made up of 10 to 15 social partners from the sector. Given that apprenticeships relate to key occupational areas organised around broad sectors, the employer engagement mechanisms are sector-focused. These mechanisms provide opportunities for employers from the creative industries to ensure frameworks and training connected to them remain industry-relevant.

The MA frameworks overseen by SDS have been running the longest and are available to individuals aged 16 and over. In 2022/23, there were 25,447 starts in total and around 39,000 MAs in training. However, of these, a relatively small proportion were within frameworks aligned to the creative industries (Figure 2.2). Indeed, there was a total of 1,570 students in training on creative MAs at the end of March 2023 and 1,769 MA starts in the 2022/23 academic year.[10] Furthermore, IT and Telecommunications (41%) and IT and Telecommunications Technical (11%) made up around half of all creative MA starts in 2022/23, with the majority of the remaining starts accounted for by Digital Applications (29%) and Digital Marketing (15%).

Figure 2.2: Apprenticeship starts and in training (all ages) by selected Modern Apprenticeship frameworks, 2022/23, Scotland
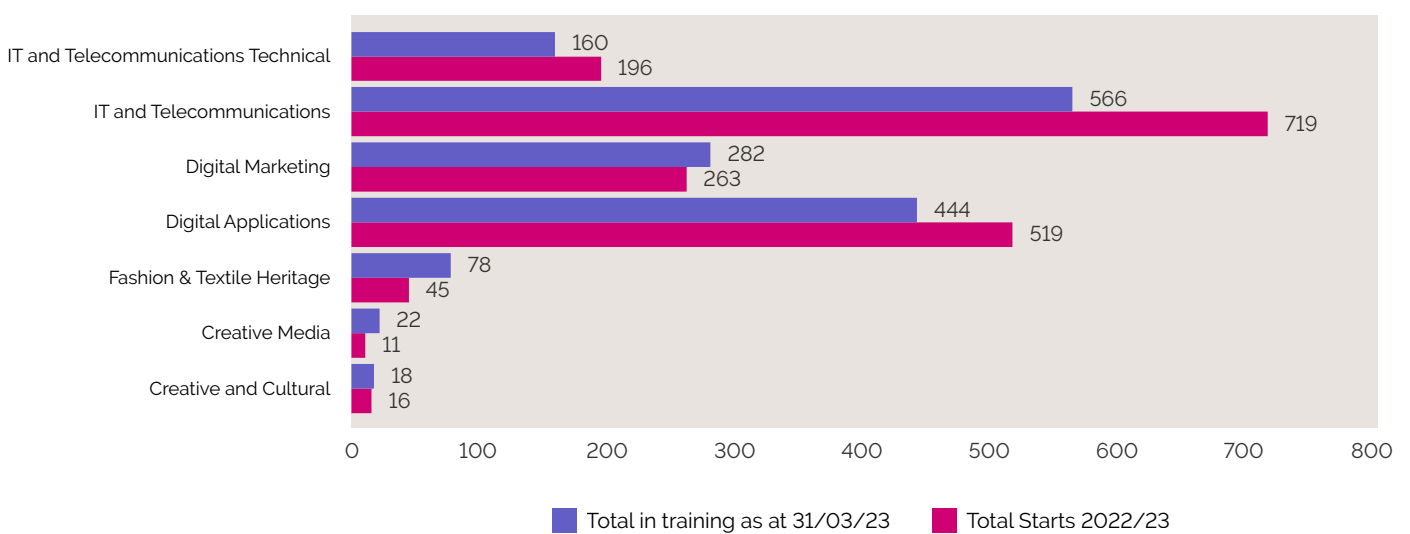
Source: Authors' elaboration based on data from SDS (2023a)

Notes: Publicly funded MAs (all ages).

Steps to enhance work-based pathways have been seen through extensions to the apprenticeship programme. This is evident with the introduction of new FAs, available in schools and colleges since 2016 (SFC, 2023), and stronger routes into HE with GAs, introduced in 2017/18 (SFC, 2022). While FAs and GAs are increasing, they are still at modest levels compared to the longer-running MAs and have lower achievement rates. For example, since their introduction, 15,371 pupils have enrolled on an FA, with the majority of these (78%) being at SCQF Level 6. In that context, in 2021/22 (cohort 6 of the scheme), there was a total of 2,512 FA enrolments, of which 294 were in Creative and Digital Media and 145 were in IT: Software Development (Figure 2.3). Similarly, the growth in GAs is still quite modest. Since 2017, when they were first introduced, 4,692 individuals have enrolled on a GA. Furthermore, in 2021/22 enrolments were around 1,166, of which 129 were for IT: Software Development, Level 10 (SFC, 2022).

Figure 2.3: Foundation Apprenticeship enrolments on selected frameworks, 2021/22, Scotland
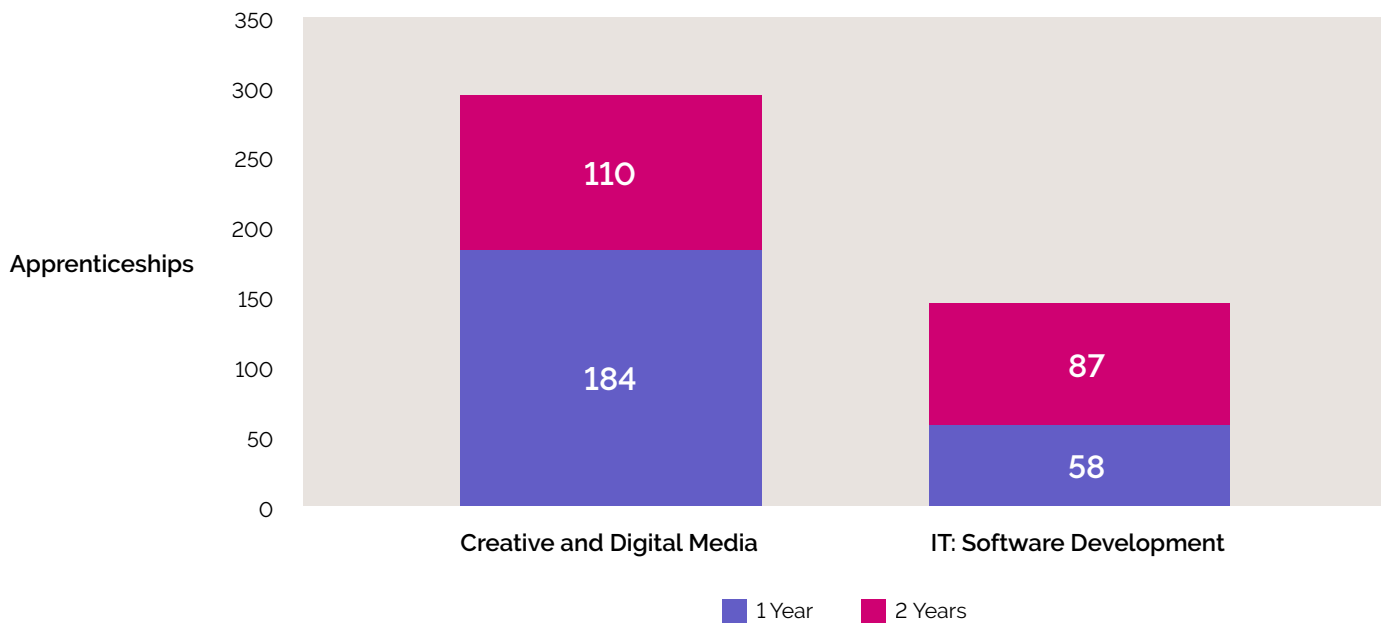
Source: Authors' elaboration based on data from SDS (2023b)

Notes: enrolments are defined as the number of new apprentices registered on FA frameworks. Cohort 6 (2021/22).

2.3: Trends over time in creative FE in Scotland

Although FE undoubtedly plays an important role in the development of creative skills for the creative industries, a worrying trend is the decline in FTE students. The last 10 years has seen a period of substantial change in the FE sector.

Moves to regionalisation in the Scottish skills system to encourage a greater responsiveness in provision – seen through the introduction of regional skills investment plans, regional skills assessments, and regional outcomes agreements to agree funding allocations to providers – have been accompanied by a major restructuring programme. This has involved local colleges merging to form regional 'super colleges' which are split across various campuses.

At the same time, the number of FTE college students has fallen, as a whole (by 5% between 2012/13 and 2022/23) and particularly in creative disciplines, where enrolments fell from 23,653 in 2012/13 to 18,830 in 2022/23 (by 20%) (Figure 2.4). This trend is seen across all creative subjects, with the smallest decrease in FTE students in Arts and Crafts (-6%) and the largest fall in Information Technology and Information courses (-29%) (Figure 2.5). As a result of the steeper declines in creative disciplines, the overall share of students in FE studying creative subjects fell from 18% in 2012/13 to 15% in 2022/23.

Figure 2.4: College students on creative disciplines (all ages, FTE), 2012/13 to 2022/23, Scotland
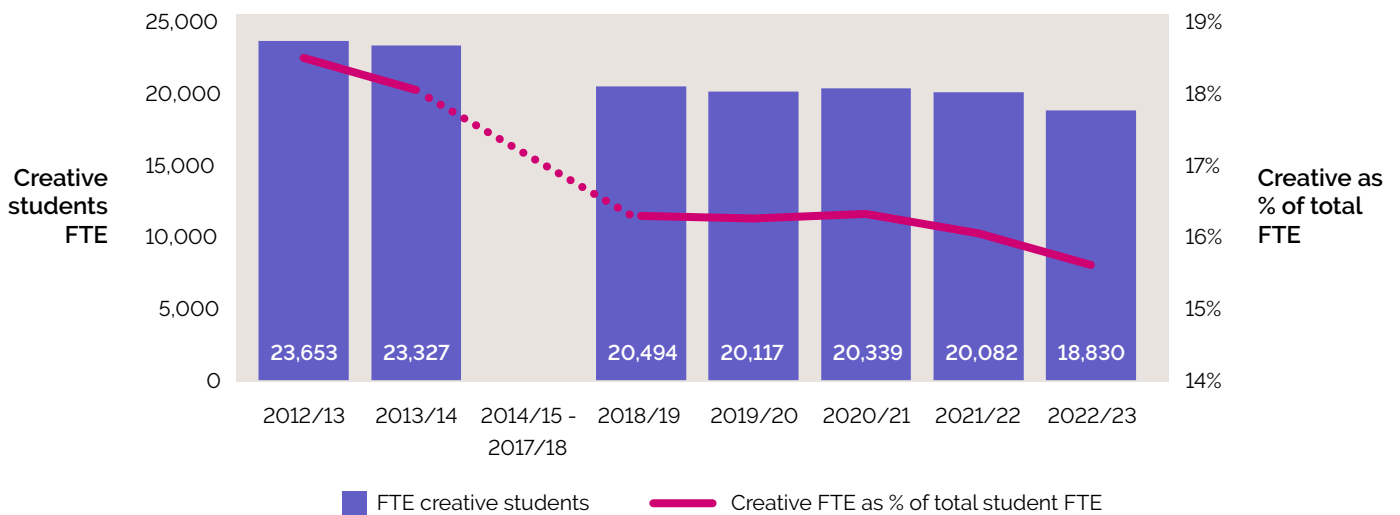
Source: Authors' elaboration based on data from SFC (2024)

Notes: Figures are for Full-Time Equivalent (FTE) students at FE colleges in Scotland. Includes full-time and part-time students (adjusted to FTE) on courses at FE and HE level delivered through FE colleges, including WBL (e.g. MAs) and introductory/ pre-access courses and non-recognised qualifications. Superclass subject titles have changed slightly over the course of the decade; the ones shown here are taken from 2022/23 and may be slightly different from those originally used in 2013/14. Data is missing for 2014/15 to 2017/18.

Figure 2.5: Percentage change in college students (all ages, FTE) by superclass subject, 2012/13 to 2022/23, Scotland
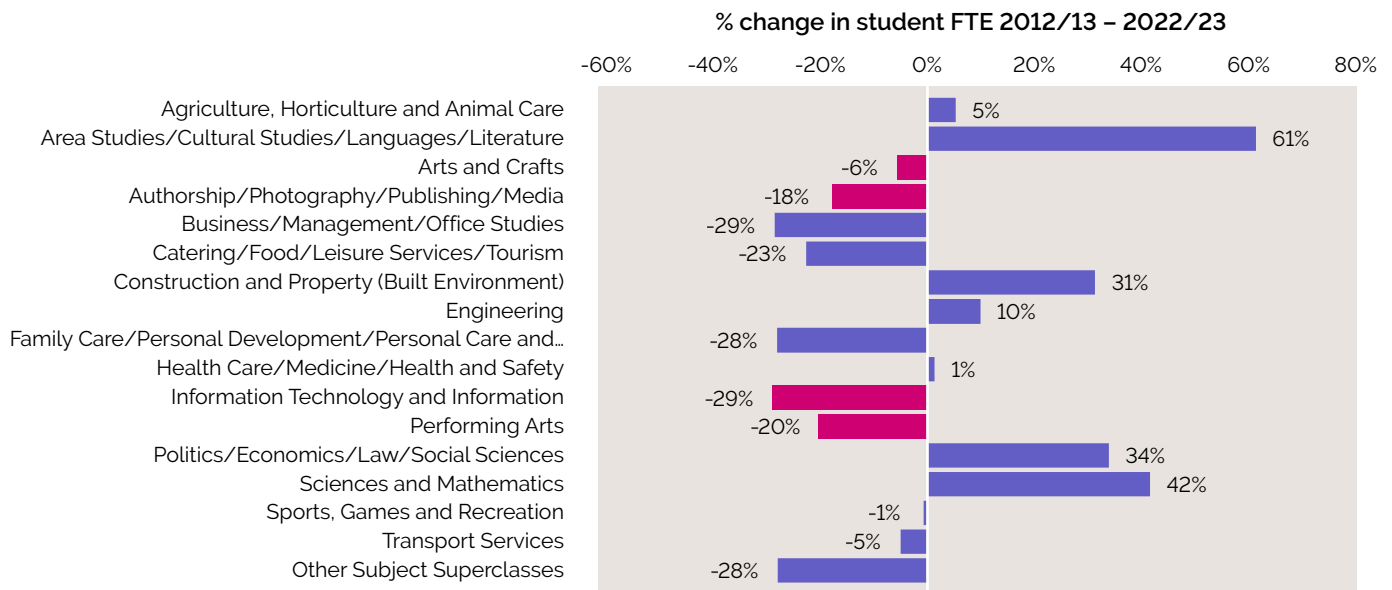
% change in student FTE 2012/13 – 2022/23

Subject	% change
Agriculture, Horticulture and Animal Care	5%
Area Studies/Cultural Studies/Languages/Literature	61%
Arts and Crafts	-6%
Authorship/Photography/Publishing/Media	-18%
Business/Management/Office Studies	-29%
Catering/Food/Leisure Services/Tourism	-23%
Construction and Property (Built Environment)	31%
Engineering	10%
Family Care/Personal Development/Personal Care and…	-28%
Health Care/Medicine/Health and Safety	1%
Information Technology and Information	-29%
Performing Arts	-20%
Politics/Economics/Law/Social Sciences	34%
Sciences and Mathematics	42%
Sports, Games and Recreation	-1%
Transport Services	-5%
Other Subject Superclasses	-28%

Source: Authors' elaboration based on data from SFC (2024)

Notes: Figures are for Full-Time Equivalent (FTE) students at FE colleges in Scotland. Includes full-time and part-time students (adjusted to FTE) on courses at FE and HE level delivered through FE colleges, including WBL (e.g. MAs) and introductory/ pre-access courses and non-recognised qualifications. Superclass subject titles have changed slightly over the course of the decade; the ones shown here are taken from 2022/23 and may be slightly different from those originally used in 2013/14. Data is missing for 2014/15 to 2017/18.

In contrast, the take-up of creative MAs has been increasing, in line with wider trends in apprenticeship numbers. Across all frameworks, the take-up of MAs in Scotland grew up to 2019/20 (with 27,875 starts), and then with the pandemic, numbers fell (to 18,655 starts in 2020/21). These trends are mirrored for creative MAs. In 2013/14, there were just 768 creative MA starts, equating to 3% of all MAs, reaching a peak of around 2,000 starts prior to the pandemic, after which numbers began to fall, with 1,450 starts on creative MAs in 2020/21 (Figure 2.6). The numbers of starts since then has increased – both for all MAs and creative MAs – but enrolments have not yet returned to pre-Covid-19 levels.

Over time, there has also been a change in the distribution of take-up in the different creative courses. In 2013/14, over half creative apprentices were in IT and Telecommunications (55%). By 2022/23, although IT and Telecommunications (41%) was still the most popular creative MA, its share of all creative MAs had reduced, and Digital Applications (29%) and Digital Marketing (15%) had become more popular.

Turning to FAs, the number of creative FAs have gradually grown over time as additional student cohorts have been supported. Indeed, creative FAs have increased substantially, from just 30 starts in 2016/17 to 439 in 2021/22, mirroring wider trends in the scale-up of FAs (Figure 2.7), similar to the finding for MAs. Furthermore, there has been a higher take-up of Creative and Digital Media FAs, with this area accounting for two thirds of the creative FAs in the past few years.

Despite the upward trajectory in the take-up of MAs and FAs, in absolute terms, the uplift in the numbers enrolled on apprenticeship frameworks aligned to the creative industries over the past decade (over 1,000 starts on MAs and over 410 starts on FAs) pales in comparison to the reduction in student enrolments on creative disciplines in FE colleges (-4,800 FTE students).

Figure 2.6: Creative Modern Apprenticeship (all ages) starts, 2013/14 to 2022/23, Scotland
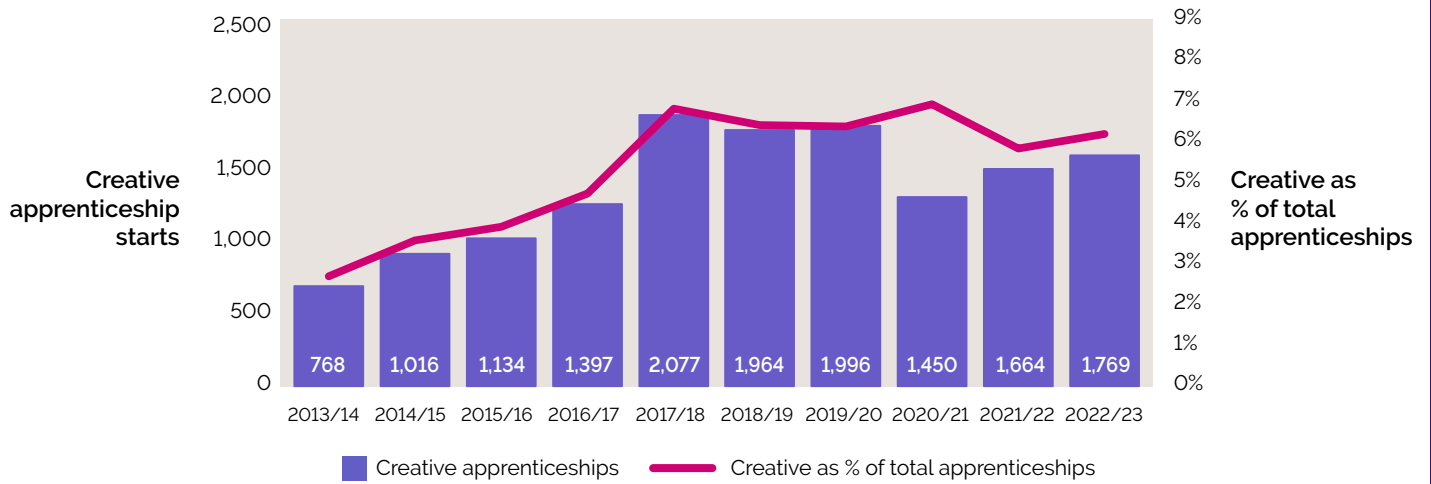
Source: Authors' elaboration based on data from SDS (2023a)

Figure 2.7: Creative Foundation Apprenticeship (aged 16-18) starts, 2016/17 to 2021/22, Scotland
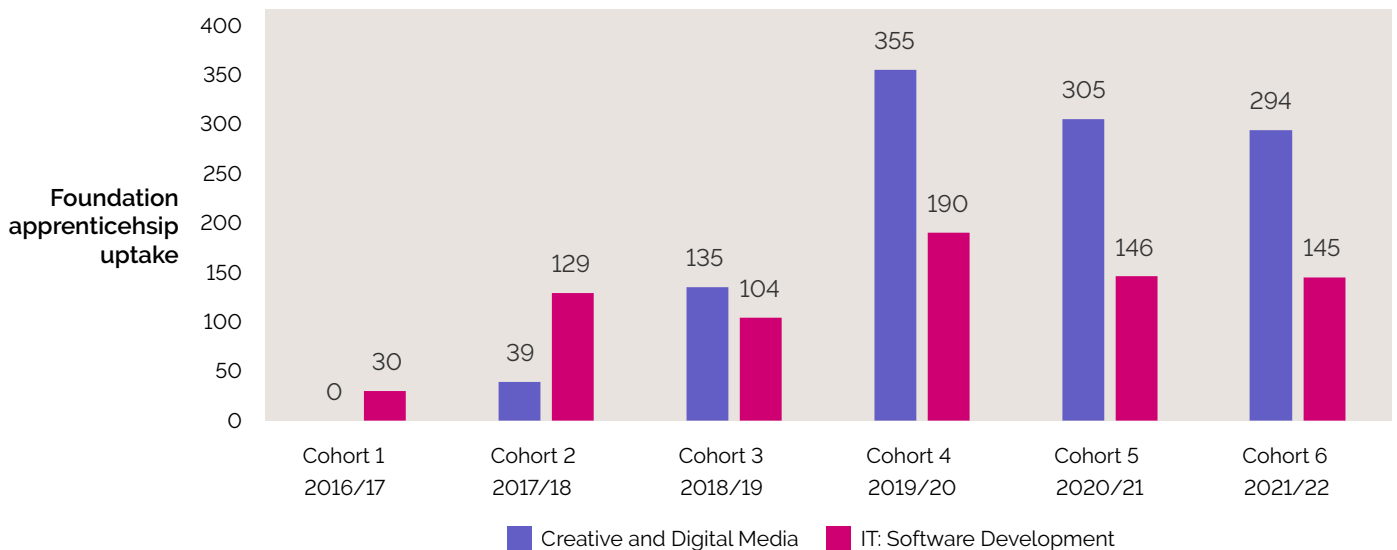
Source: Authors' elaboration based on data from SDS (2023b)

Notes: MA frameworks have changed over time. Across the series shown in Figure 2.6, creative MAs include the following frameworks: Creative; Creative and Cultural; Creative and Digital Media; Creative Media; Fashion and Textile Heritage; Digital Applications; Digital Marketing; IT and Telecommunications; IT and Telecommunications Technical; Information and Communication Technologies Profession. In 2019, revisions were made to MA start calculations, relating to the timescales for the counting of new starts and to accommodate movement between frameworks. SDS are unable to quantify the impact of this change on the reported figures. FA enrolments include one- and two-year courses.

2.4: Spatial patterns of creative FE in Scotland

The report also explores spatial patterns in creative FE, to understand variations in major providers in different parts of the Scotland and in specific creative clusters.

Unfortunately, the study has found that there is no data available on the local authority of college students broken down by superclass subject area. This data may have been previously available from the INFACT data service, but this has been decommissioned and a replacement service is currently being developed by the SFC. In the absence of such data, it has only been possible to explore variations in the spread of apprenticeships – that is, MAs and GAs.

The number of starts on MAs has been broken down by the 32 Scottish local authorities, based on the recorded home postcode of the apprentice (Figure 2.8). This gives a sense of the spread among the college community in different parts of Scotland. The following frameworks were combined to create a proxy figure for creative MAs in 2022/23: Creative

and Cultural; Creative Media; Fashion and Textile Heritage; Digital Applications; Digital Marketing; IT and Telecommunications; and IT and Telecommunications Technical.

The analysis of the distribution of MAs by local authority reveals significant spatial variation in the picture of creative FE in Scotland. In terms of numbers of starts on creative MAs, we see significant concentrations around major cities, in particular in Glasgow and Edinburgh (230 starts and 171 starts, respectively). In contrast, there were no creative apprentices from Argyll & Bute, Na h-Eileanan Siar or the Shetland Islands (Figure 2.8). However, when considering the number of starts as a share of overall MA starts, a higher proportion of MAs in creative areas was found in the City of Edinburgh (10.4%), Moray (10.2%) and Renfrewshire (10.2%).

Figure 2.8: Creative Modern Apprenticeship starts (all ages) by local authority, 2022/23, Scotland
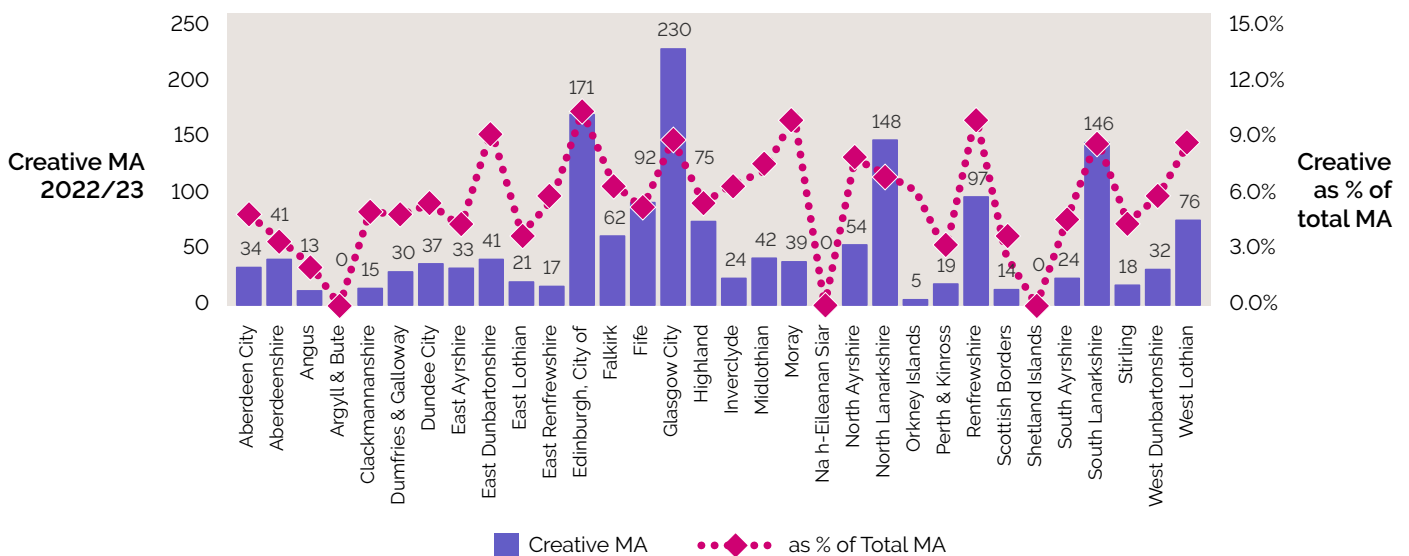
Source: Authors' elaboration based on data from SDS (2023c)

Notes: Creative MAs include the following frameworks: Creative and Cultural; Creative Media; Fashion and Textile Heritage; Digital Applications; Digital Marketing; IT and Telecommunications; IT and Telecommunications Technical Apprenticeships; Creative and Cultural Skills; IT and Digital. Local authority distribution is based on trainee postcode.

In addition, the offer of GAs in creative-related disciplines was also concentrated around Scotland's major cities, with enrolments largely limited to the cities of Glasgow and Edinburgh. It is also noteworthy that for some of these institutions, creative disciplines (particularly IT: Software Development) constituted a significant share, and in some cases a very large share, of their GA offer (Figure 2.9).

Figure 2.9: Creative Graduate Apprenticeship uptake (all ages) by university, 2021/22, Scotland
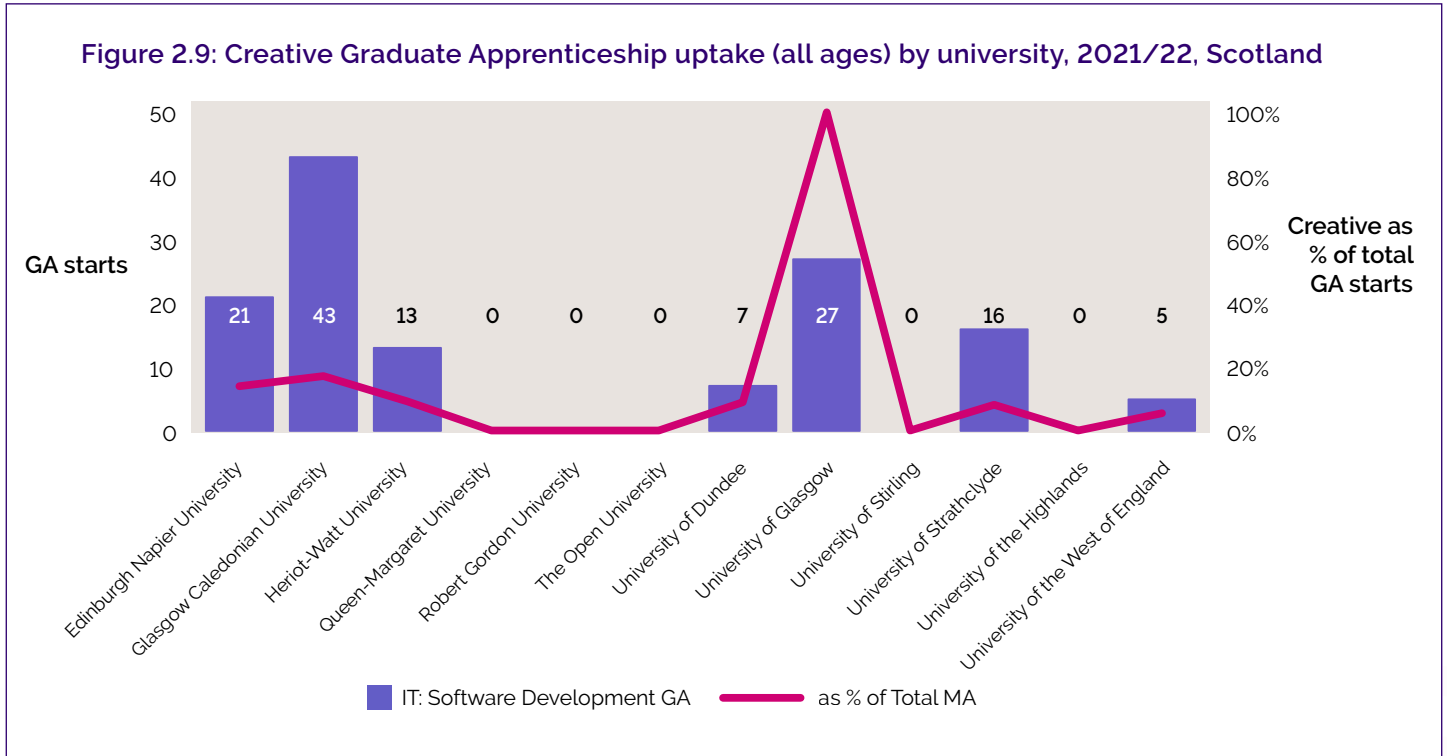
Source: Authors' elaboration based on data from SDS (2022)

Notes: Creative GAs of all ages enrolled on the IT: Software Development GA framework.
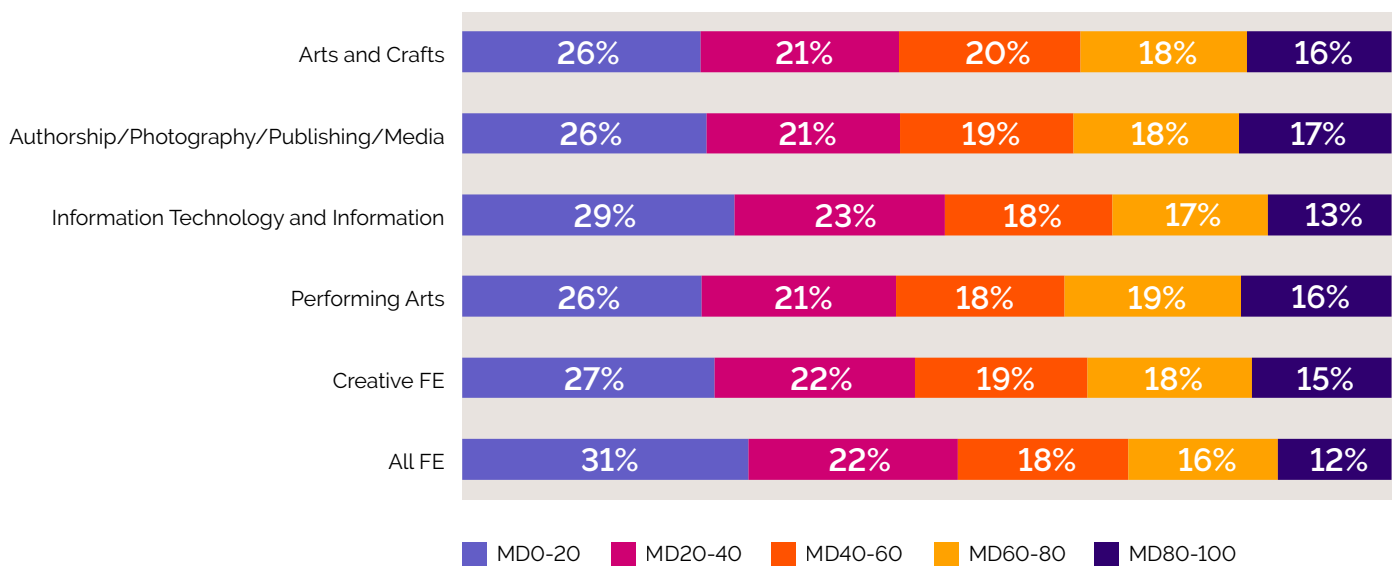
2.5: Profile of learners in creative FE in Scotland

The report also explores the profile of learners in creative FE, where possible by different background characteristics to understand whether learning opportunities are sufficiently diverse.

This is important in a context where the creative sector has been seeking to enhance the diversity of the workforce. While Scottish data on age and gender of college students was not available broken down by superclass subject, there is wider evidence provided in the Report on Widening Access (SFC, 2023). This includes data on the proportion of Scottish-domiciled enrolments at college for courses of 160+ hours in duration. The data suggests:

- In 2021/22, learners from deprived areas were underrepresented across all creative disciplines, particularly Arts and Crafts, Performing Arts, and Media, where only one in four learners (26%) were from the most deprived quintile (MD 0-20) compared to 31% of all enrolments (Figure 2.10). Further, creative disciplines had a higher a share of learners from the least deprived areas, with one in three of those studying these subjects from the two least deprived quintiles (MD 60-100) compared to 28% of all learners in FE.

- The share of students with a disability or health condition was higher on creative courses (32%) than all FE courses (24%) (Figure 2.11). This was particularly the case for those enrolled on Arts and Crafts courses (36% enrolments with a disability or health condition) and Authorship/Photography/ Publishing/Media courses (35% enrolments).

- With the exception of Information Technology and Information, those from ethnically diverse backgrounds were underrepresented in Creative FE, where over nine in ten learners were white – 93% of learners studying Arts and Crafts and Media courses – compared to 88% of learners across all subject disciplines (Figure 2.12).

- When looking at the make-up of the apprenticeship student population, the majority of MA starts were taken up by males, with 37% of creative MA starts being female. This was similar to the position for all MA starts (38%) (Figure 2.13).

Figure 2.10: Enrolments (all ages) to college courses by deprivation quintile, 2021/22, Scotland

	MD0-20	MD20-40	MD40-60	MD60-80	MD80-100
Arts and Crafts	26%	21%	20%	18%	16%
Authorship/Photography/Publishing/Media	26%	21%	19%	18%	17%
Information Technology and Information	29%	23%	18%	17%	13%
Performing Arts	26%	21%	18%	19%	16%
Creative FE	27%	22%	19%	18%	15%
All FE	31%	22%	18%	16%	12%

Source: Authors' elaboration based on data from SFC (2023b)

Figure 2.11: Enrolments (all ages) to college courses with disability or health condition, 2021/22, Scotland

% with a disability or health condition

Category	%
Arts and Crafts	36%
Authorship/Photography/Publishing/Media	35%
Information Technology and Information	28%
Performing Arts	32%
Creative FE	32%
All FE	24%
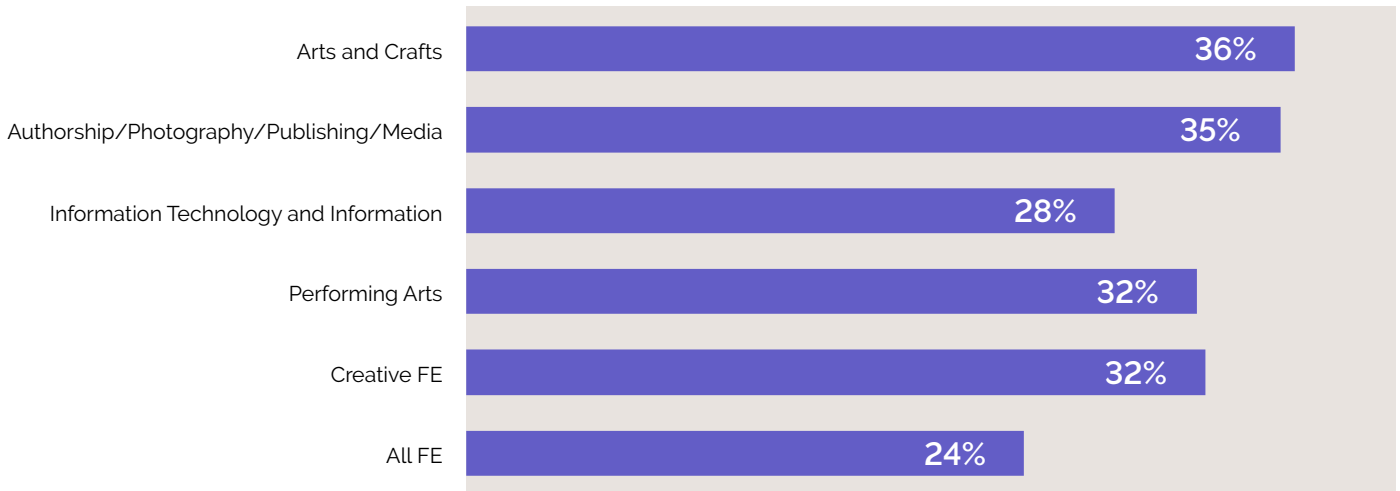
Source: Authors' elaboration based on data from SFC (2023b)

Figure 2.12: Enrolments (all ages) to college courses by ethnic group, 2021/22, Scotland

Category	White
Arts and Crafts	93%
Authorship/Photography/Publishing/Media	93%
Information Technology and Information	88%
Performing Arts	90%
Creative FE	91%
All FE	88%

Legend: White · Asian · Black · Mixed or multiple · Other · Not known
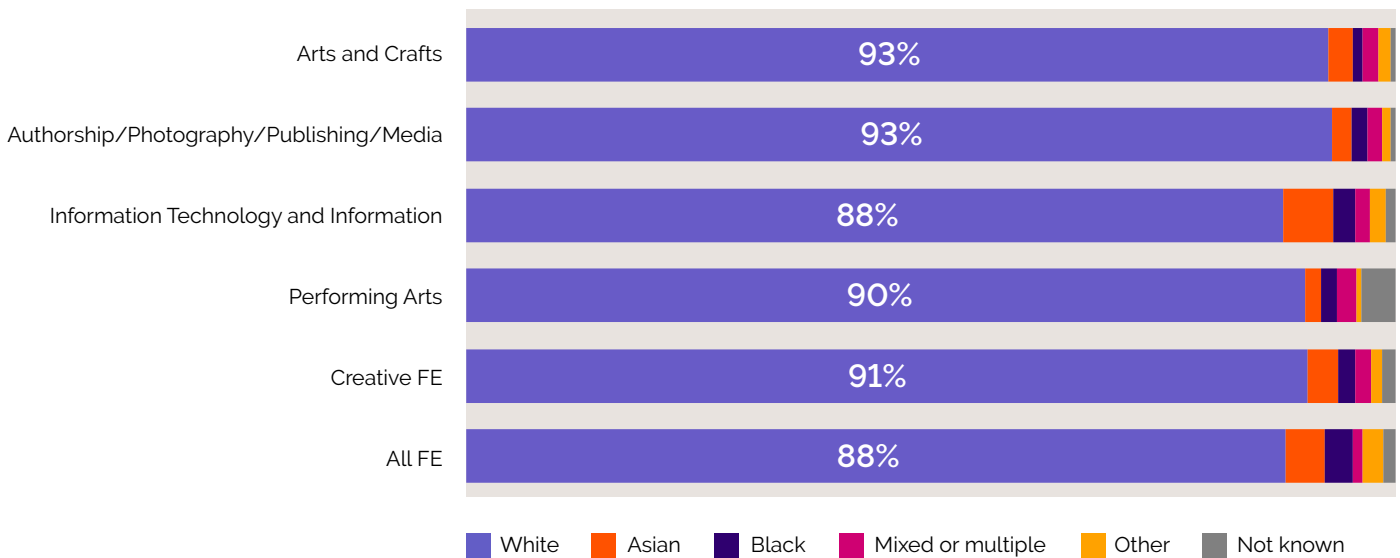
Source: Authors' elaboration based on data from SFC (2023b)

Notes: Data on college enrolments (figures 2.10 to 2.12) are Scottish-domiciled enrolments (all ages) at college to courses 160+ hours in duration by subject. Creative MAs include the following frameworks: Creative and Cultural; Creative Media; Fashion & Textile Heritage; Digital Applications; Digital Marketing; IT and Telecommunications; and IT and Telecommunications Technical Apprenticeships. Learner characteristics are self-reported.

Figure 2.13: Modern Apprenticeship starts (all ages) by gender, 2022/23, Scotland
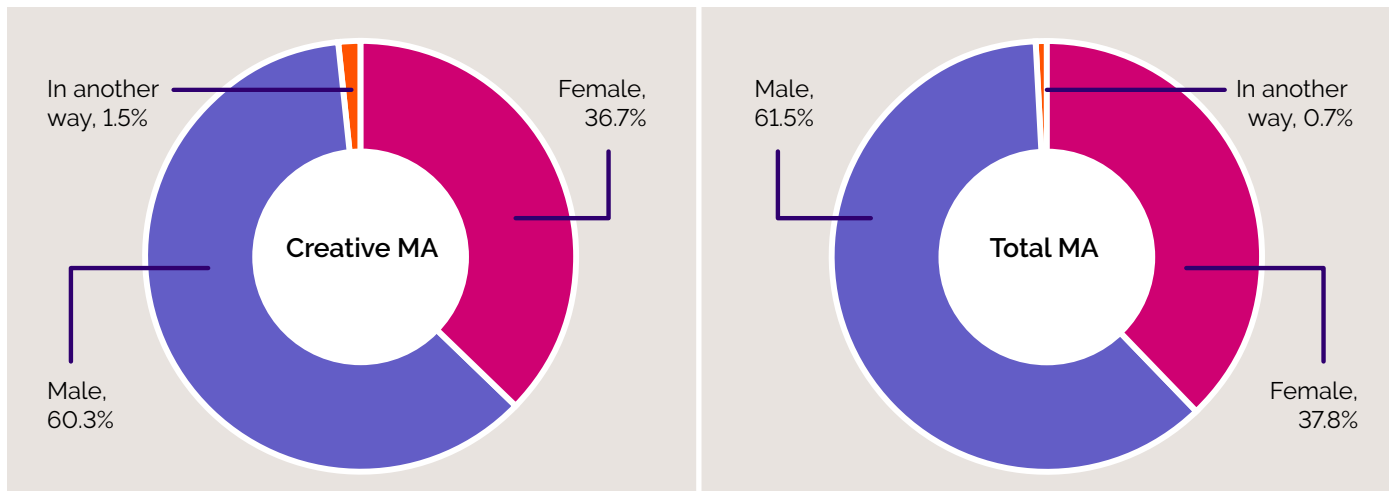
Source: Authors' elaboration based on data from SDS (2023a)

Notes: Data on college enrolments (figures 2.10 to 2.12) are Scottish-domiciled enrolments (all ages) at college to courses 160+ hours in duration by subject. Creative MAs include the following frameworks: Creative and Cultural; Creative Media; Fashion & Textile Heritage; Digital Applications; Digital Marketing; IT and Telecommunications; and IT and Telecommunications Technical Apprenticeships. Learner characteristics are self-reported.

2.6: Learner outcomes and destinations in Scotland

Finally, the analysis looked beyond the scale and nature of student enrolments in creative FE to explore variations in learner outcomes, including rates of achievement and learner destinations (i.e. further learning, employment, earnings). Figures 2.14 and 2.15 present completion rates for different FE subject groups on courses lasting 160+ hours and achievement rates for MAs.

In 2021/22, there were 2,078 completions on Art and Design courses lasting 160+ hours, 3,645 on Computing and Information and Communications Technology (ICT) courses, 2,019 on Media courses and 1,700 on Performing Arts courses. Further, for each of the four creative subject groups, completion rates were slightly lower than the FE average (65% across all subject disciplines): Art and Design (63%); Computing and ICT (58%); Media (61%); and Performing Arts (59%). As such, there was not necessarily a direct correlation between the number and share of completions. For

instance, while Computing and ICT courses lasting 160+ hours had one of highest numbers of completions at 3,645, it had one of the lowest overall shares of completions (58%). Furthermore, Performing Arts had the highest rate of partial success of any subject group (23%), and there were higher rates of withdrawal than average for Media (25%), Art and Design (25%) and Computing and ICT (24%). This points to some future performance issues that will need to be addressed (see Section 6 for further discussion).

Figure 2.14: FE outcomes (all ages) by subject group on courses lasting 160+ hours, 2020/21, Scotland

Subject group	% Completed Successful	% Partial Success	% Withdrawal
Total FE	65%	13%	21%
Total Creative	60%	17%	23%
Construction 12,112	77%	10%	13%
Languages and ESOL 7,926	76%	9%	14%
Nautical studies 617	75%	18%	8%
Special Programmes 5,686	73%	13%	14%
Engineering 11,845	73%	11%	16%
Land-based industries 2,605	69%	12%	19%
Education and training 1,194	64%	9%	27%
Art and design 2,078	63%	11%	25%
Media 2,019	61%	14%	25%
Care 16,450	60%	14%	26%
Performing arts 1,700	59%	23%	17%
Computing and ICT 3,645	58%	18%	24%
Hairdressing, Beauty and Complementary Therapies 7,260	58%	12%	29%
Business, Management and Administration 4,040	58%	15%	27%
Hospitality and tourism 4,475	57%	13%	30%
Sport and Leisure 3,797	56%	21%	23%
Science 3,979	53%	19%	27%
Social subjects 3,971	52%	19%	29%

Source: Authors' elaboration based on data from SFC (2023a)

Notes: Data is based on College Performance Indicators. Includes SFC-funded student activities, SDS-funded FA courses and college-based university 'Associate' status students. 'Completed successful' indicates that the student has completed the course year (if a one-year course, the student will have gained the qualification; if the course is more than one year and the student was not in the final year, they will have progressed to the next year of study). 'Partial success' indicates that the student completed the programme but did not gain the qualification. This could mean that the student has passed all units except one or did not pass any units at all. 'Withdrawal' indicates that the student withdrew from their studies before the programme ended.

With reference to the rates of achievement among those engaged in MAs in Scotland, the relative performance of creative MAs is relatively good compared to other areas of learning.

In 2022/23, creative MA frameworks saw achievement rates of 75%, compared to an average of 73% across all frameworks (Figure 2.15).

The achievement rates varied between different types of creative MA. Indeed, all Creative Media apprenticeship leavers in 2022/23 achieved their qualification. In contrast, the lowest achievement rates were seen in Digital Marketing (66%) and Digital Applications (67%), which fell short of the average achievement rate for MAs in Scotland.

Figure 2.15: Achievement rate (all ages) of selected Modern Apprenticeship frameworks, 2022/23, Scotland
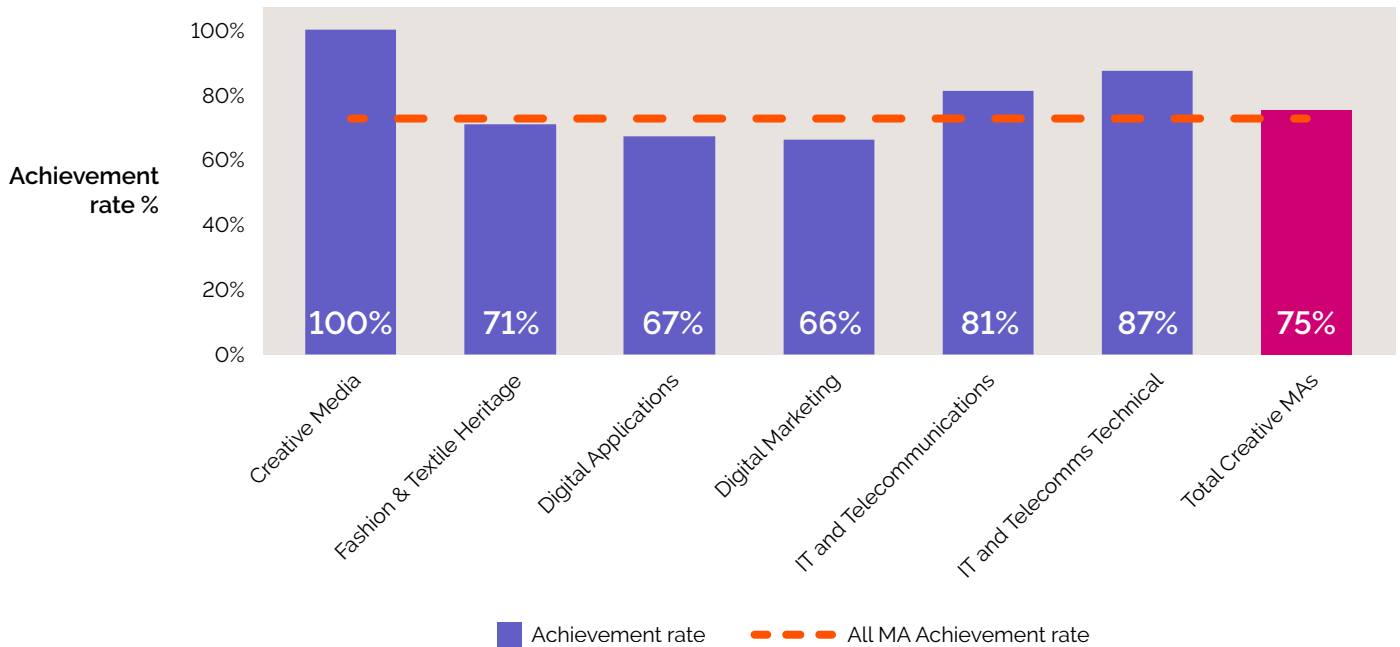
Source: Authors' elaboration based on data from SDS (2023a)

Notes: The achievement rate is the number of achievements relative to the number of leavers.

Figures 2.16 presents information on the destinations of college leavers who have completed SCQF 7+ courses.[11] This draws on data from the Survey of College Leaver Destinations, which provides information on what college graduates are doing 3–6 months after completing their qualifications.

Around 6% of students completing an SCQF 7+ course in creative disciplines were either unemployed or unavailable for work after 3–6 months – slightly higher than the average across all subjects (5%). Students completing courses in Computing and ICT (65%), Art and Design (61%) and Media (58%) were more likely to progress to further study (the average was 55%), suggesting that creative FE is an important route to higher learning. In contrast, those studying Performing Arts were more likely to go into work (50%) than the average across the student base (40%).

Figure 2.16: Destinations of SCQF 7+ college leavers (all ages) by subject, 2021/21, Scotland
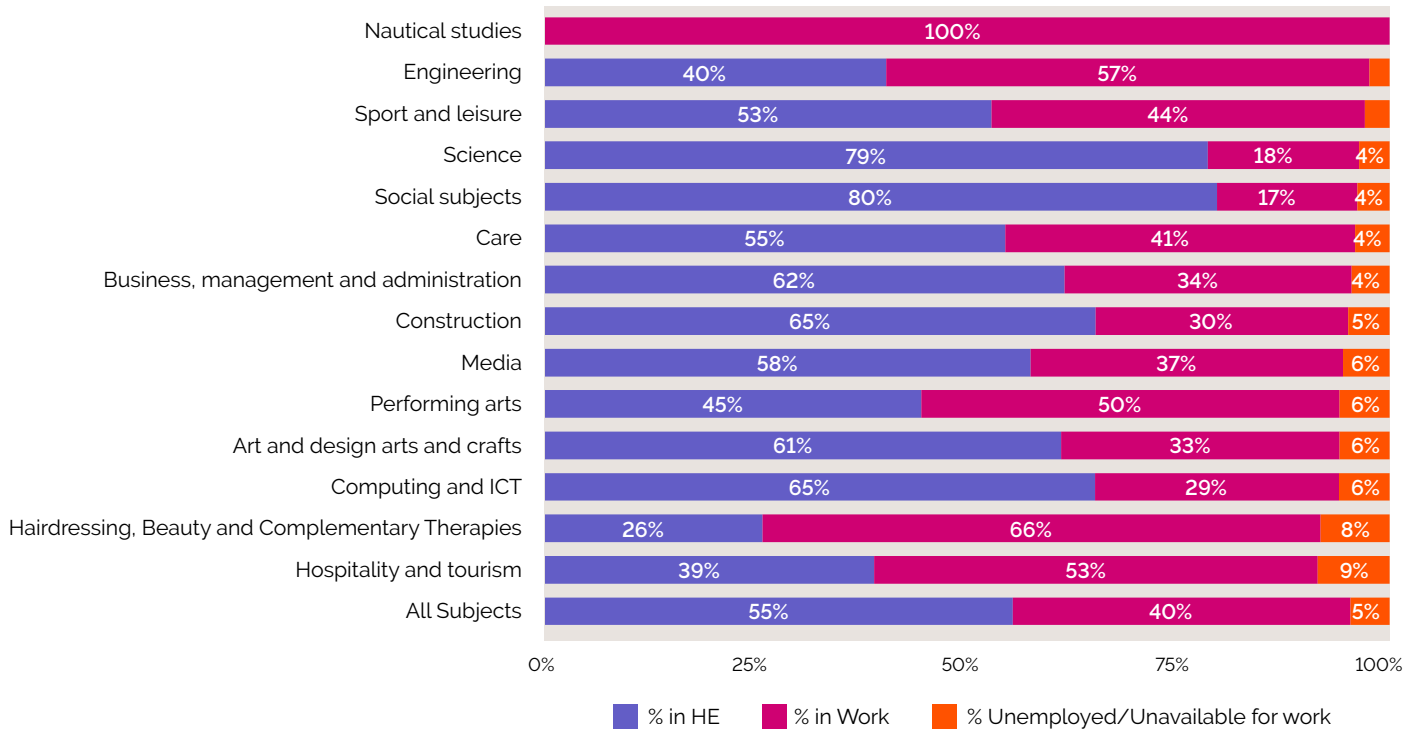
Source: Authors' elaboration based on data from SFC (2022)

Notes: Based on College Leaver Destination Surveys administered by colleges and submitted to the SFC. This includes successful qualifiers from full-time college courses, including those who have left the sector and those who have completed a full-time course but are remaining at college to complete a subsequent qualification. 'HE' refers to the share of college leavers that go on to study at HE institutions. 'Work' refers to the share moving into employment (including self-employment, apprenticeships, internships, building a portfolio and unpaid or voluntary work) and 'Unemployed/Unavailable' are those that are unemployed and looking for work and those unavailable for work for a variety of reasons (e.g. travelling, permanently unable to work, retired, looking after the home or a sick family member, further study or training).

The research also sought to examine earnings outcomes of those graduating from creative FE. However, we find significant limitations with the available data.

Longitudinal Education Outcomes data for college graduates who go on to employment is published by the Scottish Government, but only as experimental statistics for the 2012/13 cohort (SG, 2019).[12] Equivalent data for MAs is, however, published more regularly. The latest data, for 2020/21, suggests that the median earnings of individuals who have taken Creative and Cultural Skills MAs five years after completion of their studies falls below the average across all MAs (£18,800 compared to £22,000). However, the Scottish Government acknowledge a number of limitations to the data. While statistics are drawn from both PAYE and the Self-Assessment tax systems (and hence capture the earnings of those who are employees and self-employed), neither of these systems collect information about the numbers of hours worked. With a higher share of creative workers working part time, this is a significant limitation. Ongoing efforts to link the Longitudinal Education Outcomes data to the Annual Survey of Hours and Earnings will be important in providing more robust earnings data for learners who become employed, but further work will also be needed to better capture the number of days and hours worked by those who are self-employed (SG, 2023) to enable a robust assessment of the labour market outcomes for FE students.[13]

3 Creative further education in Northern Ireland

3.1: Labour market and policy context in Northern Ireland

While the economy in Northern Ireland has faced significant challenges over the last decade, in common with other parts of the UK, the creative industries are still recognised as offering strong potential for future wealth and job creation and as a vital driver of economic and social innovation.[14]

This is reflected in the recent economic performance and employment growth. For example, gross value added for the creative industries had been on an upward trajectory leading up to the Covid-19 pandemic, increasing 12.1% between 2018 and 2019 alone – outstripping growth of the wider economy (2.7%) (DfC, 2022).

Furthermore, from 2011 to 2020, employment has also grown in the creative industries at a much higher rate than for Northern Ireland as a whole (seeing an increase of 12% in employment in the sector compared to 5% for the total economy during this time). In 2020, employment in the creative industries accounted for 33,000 jobs, representing 3.9% of total employment in Northern Ireland – that share has remained steady over this period. National forecasts project significant ongoing growth in future, especially in creative clusters (Department for the Economy, 2021). For example, with the expected digital transformation of the economy, this is forecast to create an additional 25,000 jobs over the next decade alone (UU, 2019). With the growth in the creative economy driving increases in the demands for highly skilled creative workers (Giles, Carey, & Spilsbury, 2020), this raises

important challenges for the education and skills system in Northern Ireland to ensure a strong talent pipeline into the sector as well as supporting sufficient levels of lifelong learning. This is in a policy context where recent forecasts already suggest that the future supply of individuals with mid-level qualifications is likely to fall well below labour market demand over the next decade (UU, 2019).

The strategic skills priorities up to 2030 within Northern Ireland have been set by the recent Skills Strategy, Skills To Succeed for a 10x Economy (Department for the Economy, 2022). Importantly, this has a close, and direct, alignment with the Northern Ireland Economic Strategy (Department for the Economy, 2021) to ensure that skills investments in the years ahead support the needs of the future economy and that the skills system is nurturing the development of specialist skills needed by key strategic clusters, such as the creative industries. This programme of work has been heavily influenced by wider research such as The Strategic Integration of Skills and Innovation Policy in Northern Ireland (LSG, 2019) and the OECD Skills Strategy Northern Ireland (OECD, 2020). It also builds on previous strategies and programmes of work.[15]

Taken together, the current skills and economic strategies seek to pursue actions to provide better jobs and create a culture of lifelong learning for more people, enhancing opportunities and keeping skills sets relevant to get in and on in work. Core objectives include working to increase skills levels in higher and middle-level skills as well as addressing skills imbalances in the Northern Irish labour market and tackling lower skills and social exclusion. More specifically, the approach details a number of changes to the skills and education system to ensure more comprehensive vocational and educational pathways are available and accessible in future for adults to reskill and upskill, as well as for young people. This includes the expansion of the apprenticeships programme and steps to boost participation in further and higher education (HE), including through new interventions such as the Advanced Technical Award at Level 3 (Department for the Economy, 2022).

In the context of this study, and taking a closer look at further education (FE) in Northern Ireland, the Department for Education's (DfE's) Further Education Strategy for Northern Ireland is of particular relevance (Department for the Economy, 2016). A key priority of this strategy has been to restructure and transform the FE sector so that it is better placed to respond to the needs of a modern economy and to sustain its development and international standing. The data for this review has drawn heavily on the evidence base developed by the Department to inform their future policies and implementation of the FE Strategy, but with a particular focus on ensuring sufficient consideration of creative FE activities in determining the way ahead.

Following recent policy developments, Northern Ireland now has six FE colleges operating across more than 40 campuses, through over 400 outreach community locations and including an agri-food and land-based college. The FE colleges are the main providers of general, vocational and technical education and training in Northern Ireland and are expected to work to support economic development of key sectors in their local areas as well as enabling greater social inclusion and upskilling. Collectively, these providers offer a number of education and skills programmes and qualifications, largely from entry level up to Level 3, ranging from General Certificate of Education qualifications and A levels to Business and Technology Education Council qualifications, Higher National Certificates, foundation degrees, apprenticeships and other training programmes. These wider programmes include community learning and pre-employment education. In such a context, FE colleges also play a central role in raising levels of literacy, numeracy and skills in information and communications technology (ICT) through a broad range of courses, including the DfE's Essential Skills courses, which are open to individuals aged 16 and over. They are also encouraged to engage with employers locally to support technical and professional skills development. In 2022/23 there were 110,833 enrolments and 51,483 individual students, and the majority of enrolled students were at Level 2 or above (83.2%) and were young (57.4% were aged 19 or under) (Department for the Economy, 2022).

3.2: Participation in creative FE in Northern Ireland

A key first task has been to review the general picture of participation among creative learners in FE in Northern Ireland. This has involved exploring the population of students from different perspectives, including by type of learning activity (i.e. apprenticeships; education and training) and sector subject area (SSA).
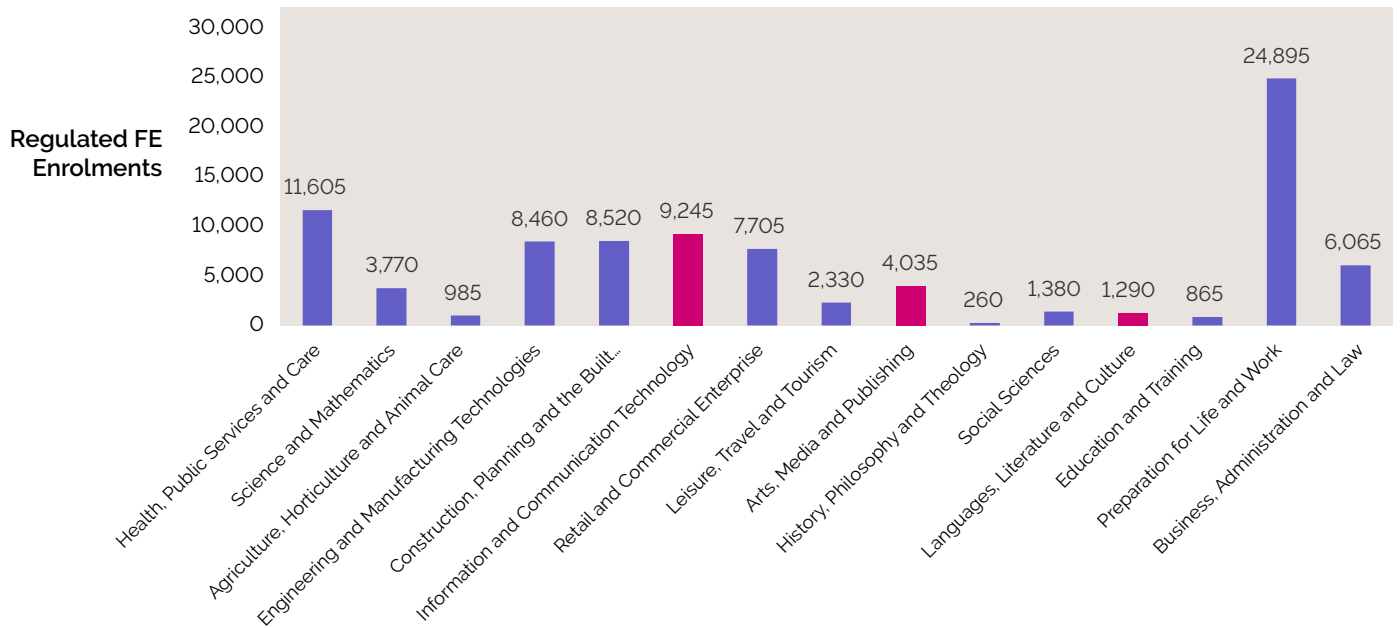
Data on FE in Northern Ireland captures courses which: appear on the Register of Regulated Qualifications[16]; appear on the – Prescribed List of Approved Qualifications (PLAQ – for Level 3 and below); or are HE in FE courses (Level 4 and above). They are formally deemed to be 'regulated' FE. Data is based on the Consolidated Data Return provided by FE colleges in Northern Ireland.[17]

In Northern Ireland, the area of learning (subject discipline) is mapped to SSAs.[18] It is not possible to directly map SSAs to creative industries, but Arts, Media and Publishing, Languages, Literature and Culture, and Information and Communication Technology are likely to be three of the largest categories for creative FE. Figures for the latest year are reported for each source but may vary by qualification – this is noted in the charts and discussion.

In 2021/22 there were 14,570 regulated FE enrolments (all ages) covering various creative courses; this comprised around 16% of the total FE regulated enrolments (91,405). This consisted of: 4,035 enrolments on Arts, Media and Publishing courses (28% of all creative enrolments); 9,245 on Information and Communication courses (63% of all creative enrolments); and 1,290 on Languages, Literature and Culture courses (9% of all creative enrolments) (Figure 3.1).

Figure 3.2 provides a closer examination of two of the broad subject areas – Arts, Media and Publishing and Languages, Literature and Culture. For the former group, the highest share of enrolments was within Creative Media and Communications (1,860 enrolments), followed by Crafts, Creative Arts and Design (1,160) and then Performing Arts (1,015). In turn, more detailed information for Languages, Literature and Culture suggests that enrolments were split evenly between Languages, Literature and Culture of the British Isles and Other Languages, Literature and Culture (each with just over 600 enrolments).

Figure 3.1: Regulated college-based FE enrolments (all ages) by Tier 1 SSAs, 2021/22, Northern Ireland

Regulated FE Enrolments

Category	Value
Health, Public Services and Care	11,605
Science and Mathematics	3,770
Agriculture, Horticulture and Animal Care	985
Engineering and Manufacturing Technologies	8,460
Construction, Planning and the Built…	8,520
Information and Communication Technology	9,245
Retail and Commercial Enterprise	7,705
Leisure, Travel and Tourism	2,330
Arts, Media and Publishing	4,035
History, Philosophy and Theology	260
Social Sciences	1,380
Languages, Literature and Culture	1,290
Education and Training	865
Preparation for Life and Work	24,895
Business, Administration and Law	6,065

Source: Authors' elaboration based on data from Department for the Economy (2022b), Table A20

Figure 3.2: Regulated college-based FE enrolments (all ages) for selected creative Tier 2 SSAs, 2021/22, Northern Ireland

Media and Communication 1,860	Crafts, Creative Arts and Design 1,160
	Performing Arts 1,015
Other Languages, Literature and Culture 660	Languages, Literature and Culture of the British Isles; 625

■ Arts, Media and publishing   ■ Languages, literature and culture
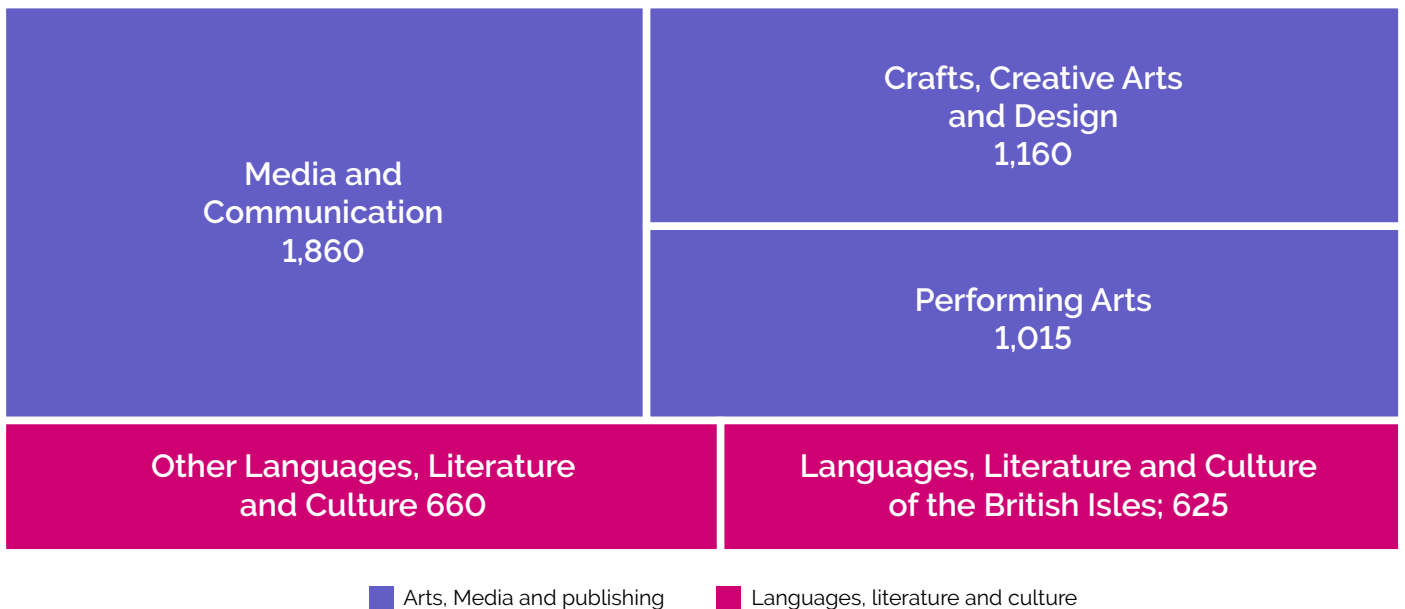
Source: Authors' elaboration based on data from Department for the Economy (2022e), Table 30

Notes: 'Regulated enrolments' are regarded as those on courses that are at 'Level 3 or below' and appear on the Register of Regulated Qualifications, which contains qualifications on both the Qualifications and Credit Framework and the National Qualifications Framework or qualifications that are part of the Prescribed List of Approved Qualifications (PLAQ/access list) and HE qualifications ('Level 4 and above'). Data excludes FE provision through school sixth forms, HE institutions and private providers.

A review of Northern Ireland's apprenticeship programmes provides an opportunity to explore those pathways which secure industry-recognised qualifications and training, often while working.[19] There are currently three levels of apprenticeship in Northern Ireland: Level 2; Level 3; and Higher Level Apprenticeships from Level 4 to Level 8. It usually takes up to two years to complete Level 2 and up to four years to finish levels 2 and 3, depending on the course. In turn, Higher Level Apprenticeships usually take a minimum of two years to complete. These frameworks are reviewed and developed by the Department for the Economy, working collaboratively with industry stakeholders through a number of Sectoral Partnerships for youth training and apprenticeships.[20] The Sectoral Partnerships review and develop the content of all apprenticeship frameworks from Level 2 to Level 8 to ensure training is industry-relevant. There are around 15 Sectoral Partnerships, with two applying to the creative industries: ICT; and Cultural and Creative.

In addition, related qualification frameworks are aligned to National Occupational Standards, which are developed in partnership with recognised sector bodies to ensure they meet industry standards. National Occupational

Standards design and updates are jointly managed by the devolved administrations in Scotland, Wales and Northern Ireland. There are five ApprenticeshipsNI frameworks at levels 2 or 3 directly relevant to the creative industries, out of a total of around 170. These cover: Creative and Digital Media; Fashions and Textiles; IT and Telecoms Professional; Marketing; and Social Media and Digital Marketing. Out of the 45 total Higher Level Apprenticeships, three cover creative subject areas: Information and Communication Technology; Arts, Media and Publishing; and Languages, Literature and Culture.

The take-up of apprenticeships is still very low compared to overall FE regulated enrolments, especially in Higher Level Apprenticeships. For example, there were 9,686 apprenticeships in total in Northern Ireland in July 2022, of which 318 were creative apprenticeships (3%). The majority of these were in IT and Telecoms Professional (98%) (see Figure 3.3). Furthermore, there were only 413 Higher Level Apprenticeship starts in total in 2020/21 across all subject areas. Of these, 60 were in Information and Communication Technology (15%). There were no starts in Arts, Media and Publishing or in Languages, Literature and Culture in 2020/21 (Figure 3.4).

Figure 3.3: All participants (all ages) on creative ApprenticeshipsNI frameworks, July 2022, Northern Ireland

	July 2022
Creative and Digital Media	3
Fashions and Textiles	2
IT and Telecoms Professional	313
Marketing	0
Social Media and Digital Marketing	0
Creative apprenticeships	318
Total apprenticeships	9,686

Source: Authors' elaboration based on data from Department for the Economy (2022a), Worksheet 2_2

Notes: Figure 3.3 data is for participants on ApprenticeshipsNI frameworks. An individual can participate in ApprenticeshipsNI more than once. Higher Level Apprenticeships are at levels 4 and 5.

Figure 3.4: Selected Higher Level Apprenticeship starts (all ages), 2020/21, Northern Ireland
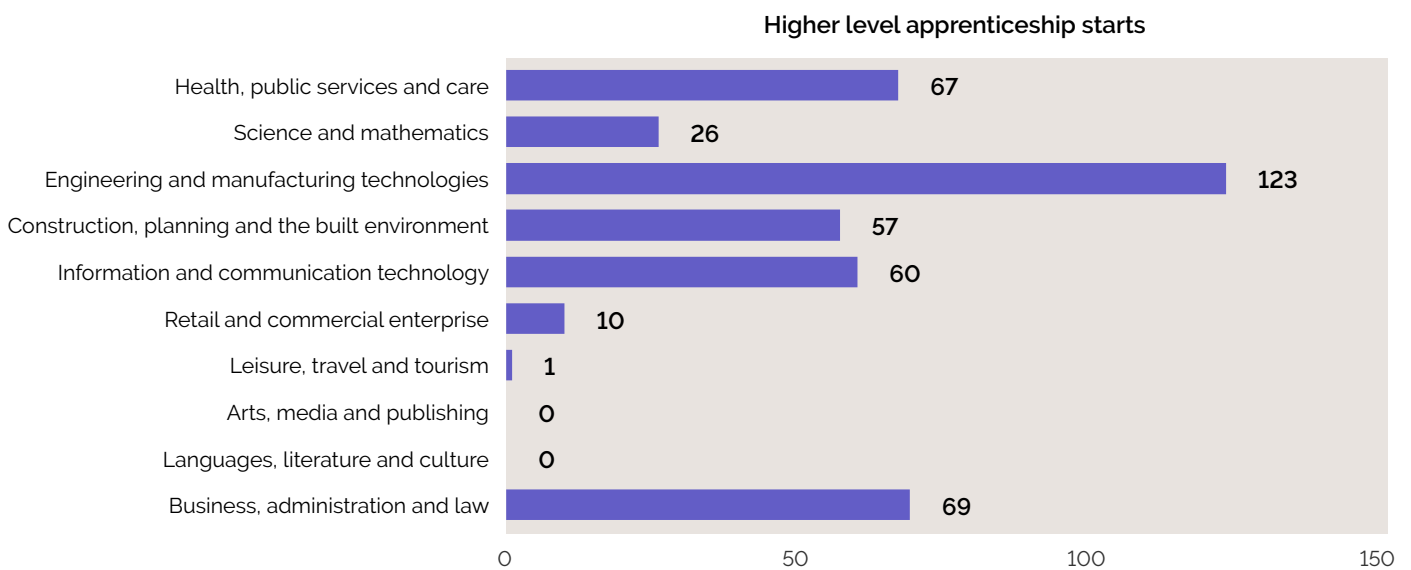
Higher level apprenticeship starts

Subject	Starts
Health, public services and care	67
Science and mathematics	26
Engineering and manufacturing technologies	123
Construction, planning and the built environment	57
Information and communication technology	60
Retail and commercial enterprise	10
Leisure, travel and tourism	1
Arts, media and publishing	0
Languages, literature and culture	0
Business, administration and law	69

Source: Authors' elaboration based on data from Department for the Economy (2022c), Table B6

Notes: Figure 3.3 data is for participants on ApprenticeshipsNI frameworks. An individual can participate in ApprenticeshipsNI more than once. Higher Level Apprenticeships are at levels 4 and 5.

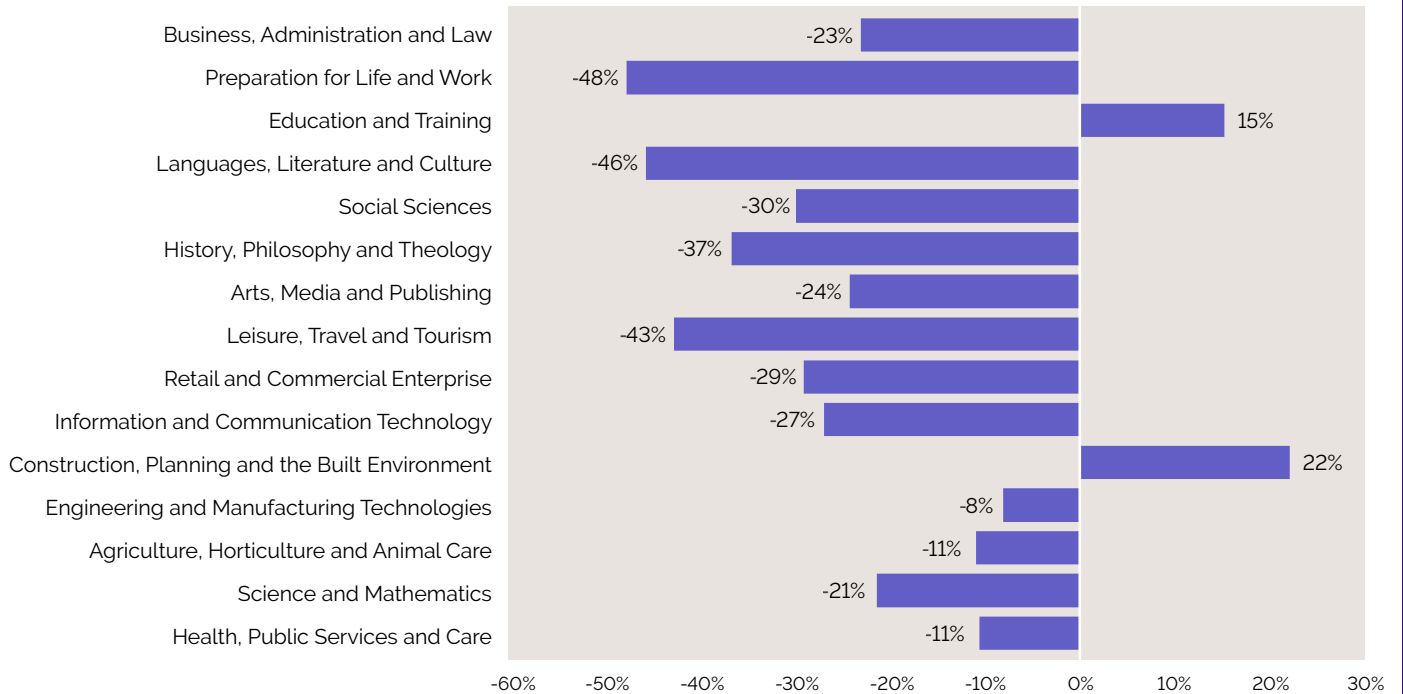## 3.3: Trends over time in creative FE in Northern Ireland

The analysis has assessed trends in creative FE within Northern Ireland over time, reviewing participation rates from 2017/18 to 2021/22. Although FE undoubtedly plays an important role in the development of creative skills for the creative industries, a worrying trend is reflected in the recent decline in overall FE as well as regulated enrolments.

The last 10 years has seen a period of substantial change in the FE sector, as highlighted earlier, with a significant restructuring of the college estate seeking to strengthen connections between FE provision and the needs of the labour market and to encourage the promotion of technical learning pathways and skills development to support greater lifelong learning. However, this has not translated into greater participation in the FE sector. For example, regulated FE enrolments have fallen by 29% over the past five years, from 129,055 in 2017/18 to 91,405 in 2021/22. These falls in participation were seen across the board in all subject areas with two exceptions:

Education and Training, which saw a 15% increase, and Construction Planning and the Built Environment, which increased by 22%.

A closer examination of trends within creative subjects highlights some important features. Firstly, there are significant variations between the different creative subjects. Indeed, Languages, Literature and Culture have seen among the greatest declines over this period (a decrease of 46%), while declines in enrolments in Arts, Media and Publishing and Information and Communication Technology have declined at slower rates than for all subject areas (24% and 27%, respectively, compared to 29%) (Figure 3.5).

Figure 3.5: Percentage change in regulated college-based FE enrolments (all ages) by Tier 1 SSAs, 2017/18 to 2021/22, Northern Ireland

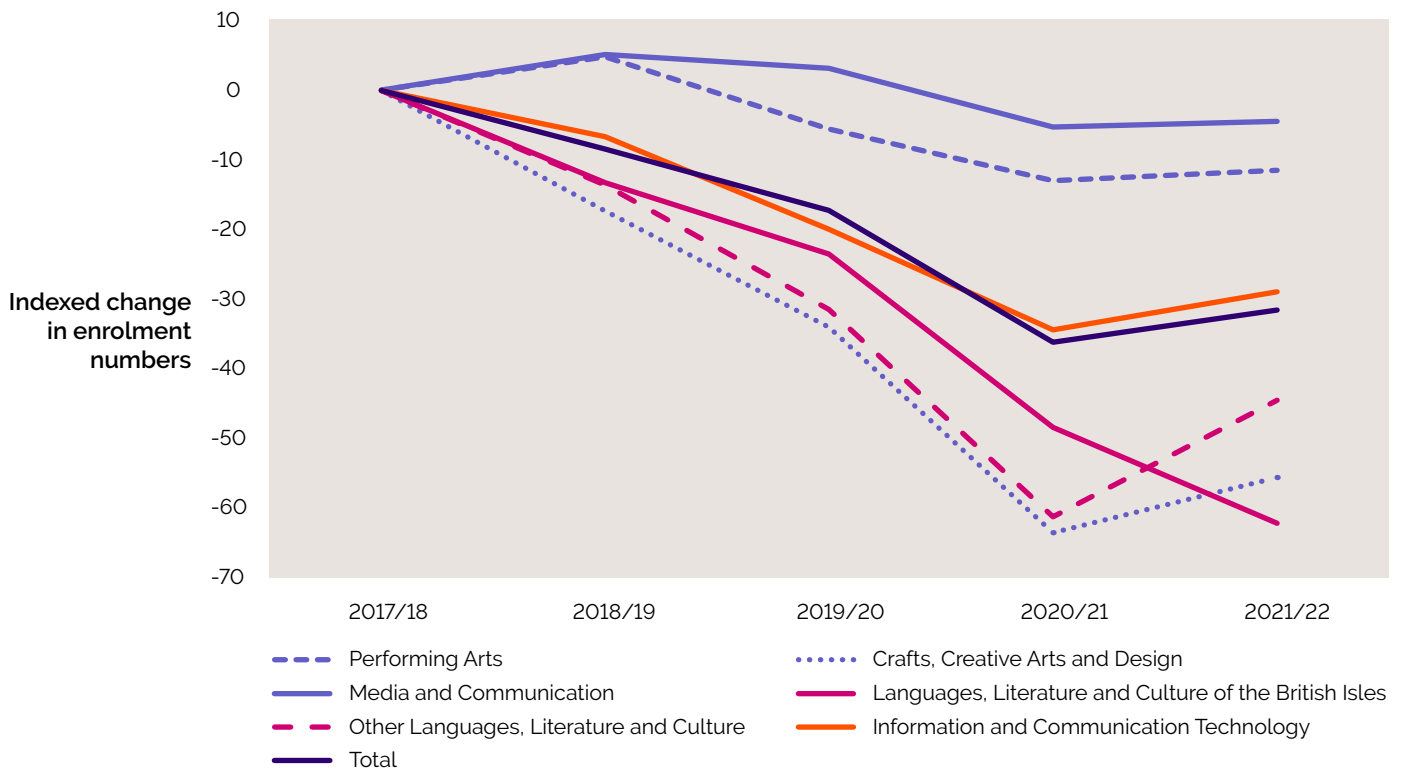| Tier 1 SSA	Percentage change
Business, Administration and Law	-23%
Preparation for Life and Work	-48%
Education and Training	15%
Languages, Literature and Culture	-46%
Social Sciences	-30%
History, Philosophy and Theology	-37%
Arts, Media and Publishing	-24%
Leisure, Travel and Tourism	-43%
Retail and Commercial Enterprise	-29%
Information and Communication Technology	-27%
Construction, Planning and the Built Environment	22%
Engineering and Manufacturing Technologies	-8%
Agriculture, Horticulture and Animal Care	-11%
Science and Mathematics	-21%
Health, Public Services and Care	-11%

Source: Authors' elaboration based on data from Department for the Economy (2022b), TableA20

Notes: 'Regulated enrolments' are regarded as those on courses that are at 'Level 3 or below' and appear on the Register of Regulated Qualifications, which contains qualifications on both the Qualifications and Credit Framework and the National Qualifications Framework, or are part of the Prescribed List of Approved Qualifications (PLAQ/Access list) and HE qualifications ('Level 4 and above').

Secondly, enrolment numbers fell steeply in 2020/21, presumably due to the impact of the Covid-19 pandemic (Figure 3.6). Thirdly, some creative subjects have shown more stability than others in their enrolments over time. For example, the 24% decrease in enrolments in Arts, Media and Publishing was predominantly caused by the decline in enrolments in Crafts, Creative Arts and Design, with Media and Communication and Performing Arts being more stable over the period.

Figure 3.6: Indexed change in regulated college-based FE enrolments (all ages) for select Tier 2 SSAs, 2017/18 to 2021/22, Northern Ireland

Source: Authors' elaboration based on data from Department for the Economy (2022b), TableA20

Notes: Indexing changes in enrolment enables closer analysis – that is, where 0 = enrolments in 2017/18,percentage change each year is then applied to the running total to provide a standardised change over time.

In contrast to general FE enrolments, apprenticeship programmes have witnessed an increase in take-up over time as steps have been taken to promote technical education. Indeed, between April 2018 and July 2022, there was an overall increase of 22% in participants on all apprenticeship frameworks (a growth of 1,735 participants, reaching a total of 9,686 overall) (Figure 3.7). Over the same period, creative apprenticeships also increased, and by a much greater rate (336%), but numbers were still very low – increasing by only 245 from April 2018 to reach a total of 318 in July 2022. This growth was also driven entirely by the increase in apprenticeships in IT and Telecoms Professional.

Take-up of Higher Level Apprenticeships has also been increasing, and at a faster rate (by 27% between 2017/18 and 2020/21, from 324 to 413 starts). Focusing specifically on creative participation, Higher Level Apprenticeship starts on Information and Communication Technology saw greater increases, of 150%, though again take-up was very limited, with 24 starts in 2017/18 rising to 60 starts in 2020/21 (Figure 3.8). There were no Higher Level Apprenticeship starts in Arts, Media and Publishing or Languages, Literature and Culture in any year.

Figure 3.7: All participants (all ages) on creative ApprenticeshipsNI, 2018–2022, Northern Ireland

	April 2018	April 2019	April 2020	April 2021	July 2022
Creative and Digital Media	6	1	*	*	3
Fashions and Textiles	*	*	*	*	2
IT and Telecoms Professional	61	62	107	271	313
Marketing	*	1	*	*	*
Social Media & Digital Marketing	6	19	6	*	*
Creative apprenticeships	73	83	113	271	318
Total apprenticeships	7,951	7,927	7,714	8,841	9,686

Source: Authors' elaboration based on data from Department for the Economy (2022a), Worksheet 2_2

Figure 3.8: Selected Higher Level Apprenticeship starts (all ages), 2017/18 and 2021/22, Northern Ireland
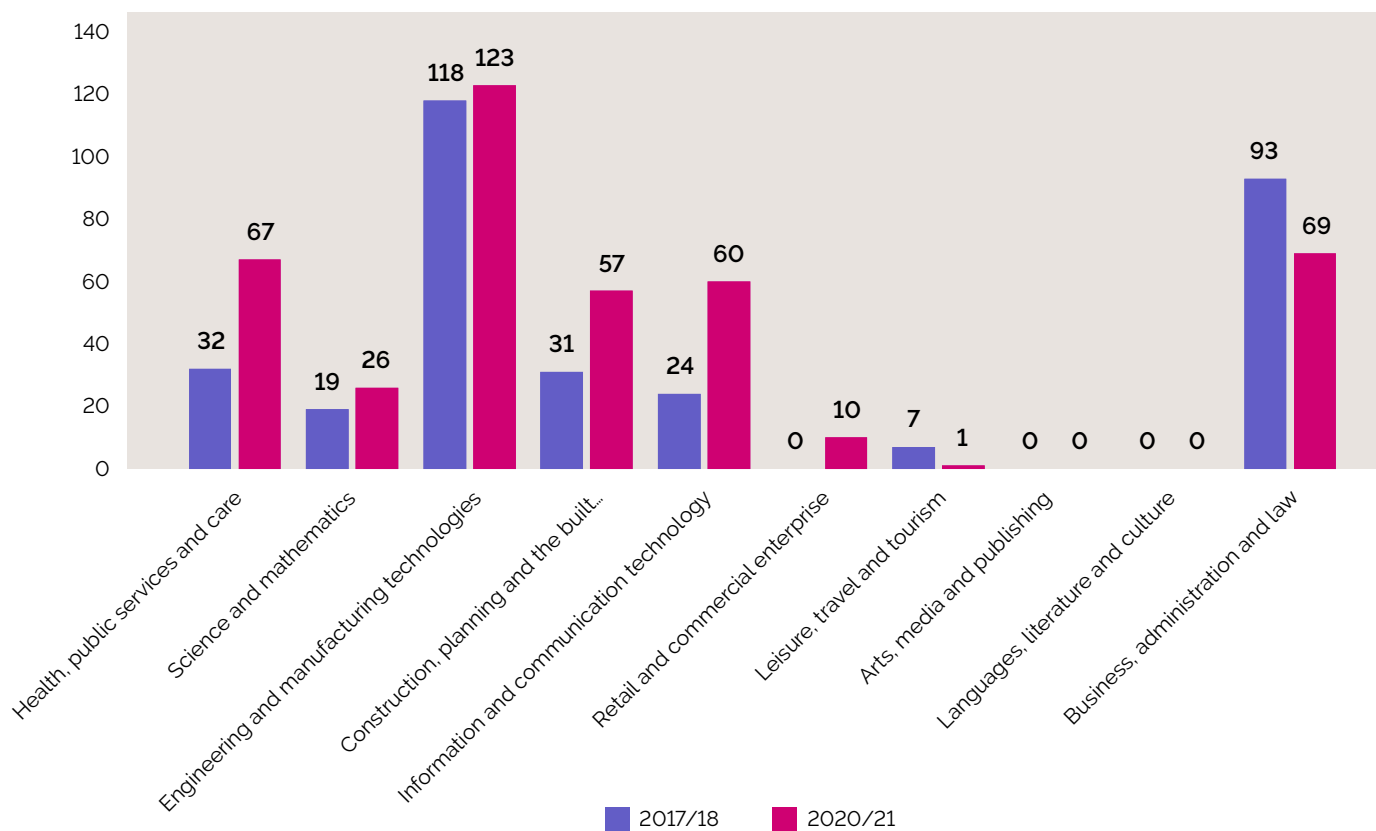
Source: Authors' elaboration based on data from Department for the Economy (2022c), Table B6

Notes: * indicates that a framework was not included in the table for that period. Data is for participants on ApprenticeshipsNI frameworks. An individual can participate in ApprenticeshipsNI more than once. Higher Level Apprenticeships are at levels 4 and 5.

3.4: Spatial patterns of creative FE in Northern Ireland

The report has also aimed to explore spatial patterns in creative FE to understand variations in major providers in different parts of the country and specific creative clusters.

Firstly, in examining variations in creative enrolments (all ages)[21] between the six different FE colleges providing regulated FE courses in Northern Ireland, we find that Belfast Metropolitan College was the largest provider of creative FE and also has the highest share of creative enrolments as a proportion of total enrolments (22%) (figures 3.9 and 3.10). In contrast, North West Regional College had the lowest absolute numbers of creative enrolments – just 1,635, equivalent to 15% of total enrolments at the college and just 11% of creative enrolments in Northern Ireland.

Figure 3.9: Regulated college-based FE enrolments (all enrolments) by FE college, 2021/22, Northern Ireland
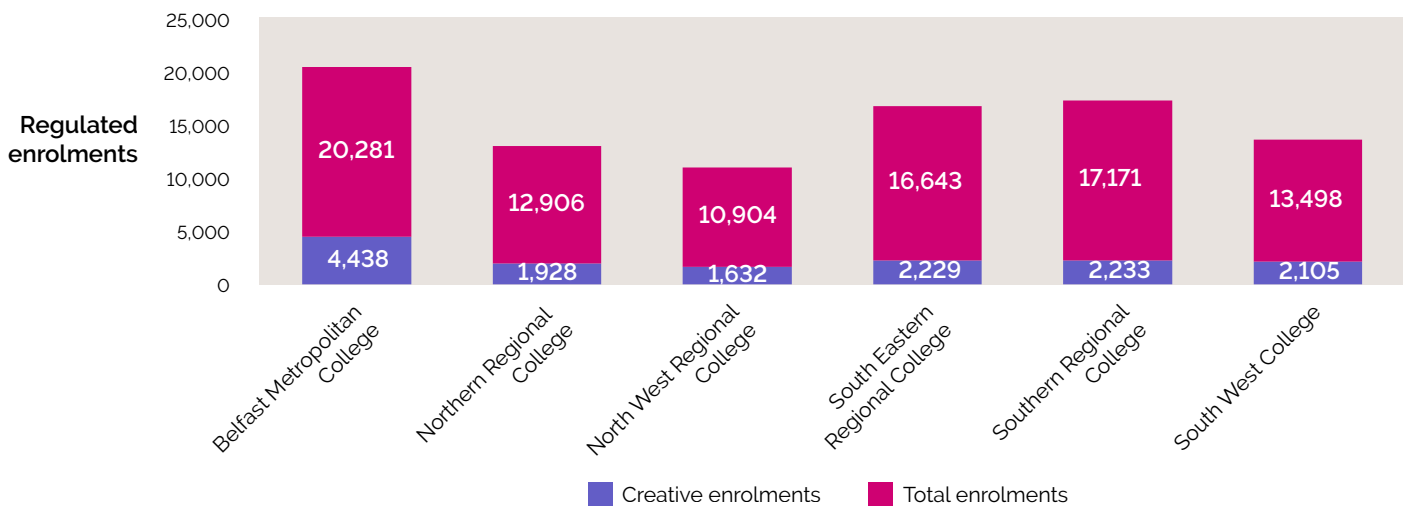
Source: Authors' elaboration based on data from Department for the Economy (2022b), TableA20

Figure 3.10: Map of Assembly areas with creative college-based FE enrolments (all ages) as percentage of total enrolments, Northern Ireland
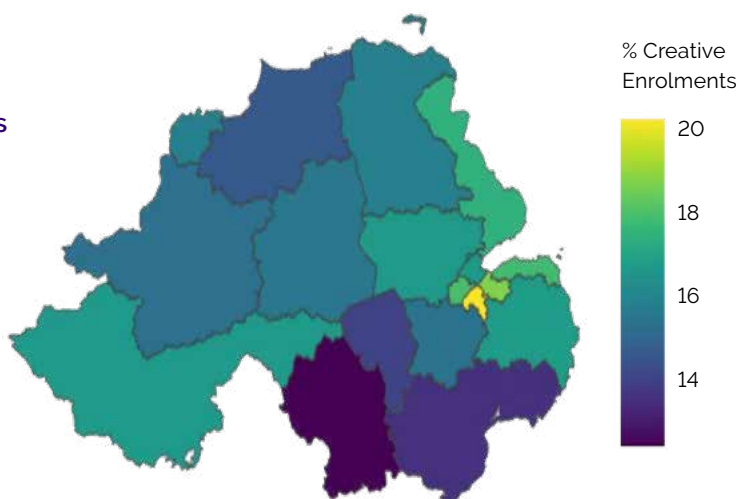
Notes: Creative enrolments include the following SSA Tier 1 categories: Arts, Media and Publishing; Languages, Literature and Culture; and Information and Communication Technology. The Assembly area is based on the postcode provided by the student at the time of enrolment.

Source: Authors' elaboration based on data from Department for the Economy (2023)

Students were assigned to one of the 18 Assembly areas using the postcodes provided on enrolment records. Assembly areas around Belfast had the highest proportion of creative enrolments relative to total enrolments – up to 20% in Belfast South – while Upper Bann (1,115) and Fermanagh and South Tyrone (1,085) had the highest overall numbers of creative enrolments (Figure 3.11).

Figure 3.11: Creative college-based FE enrolments (all ages) by Assembly area, 2021/22, Northern Ireland

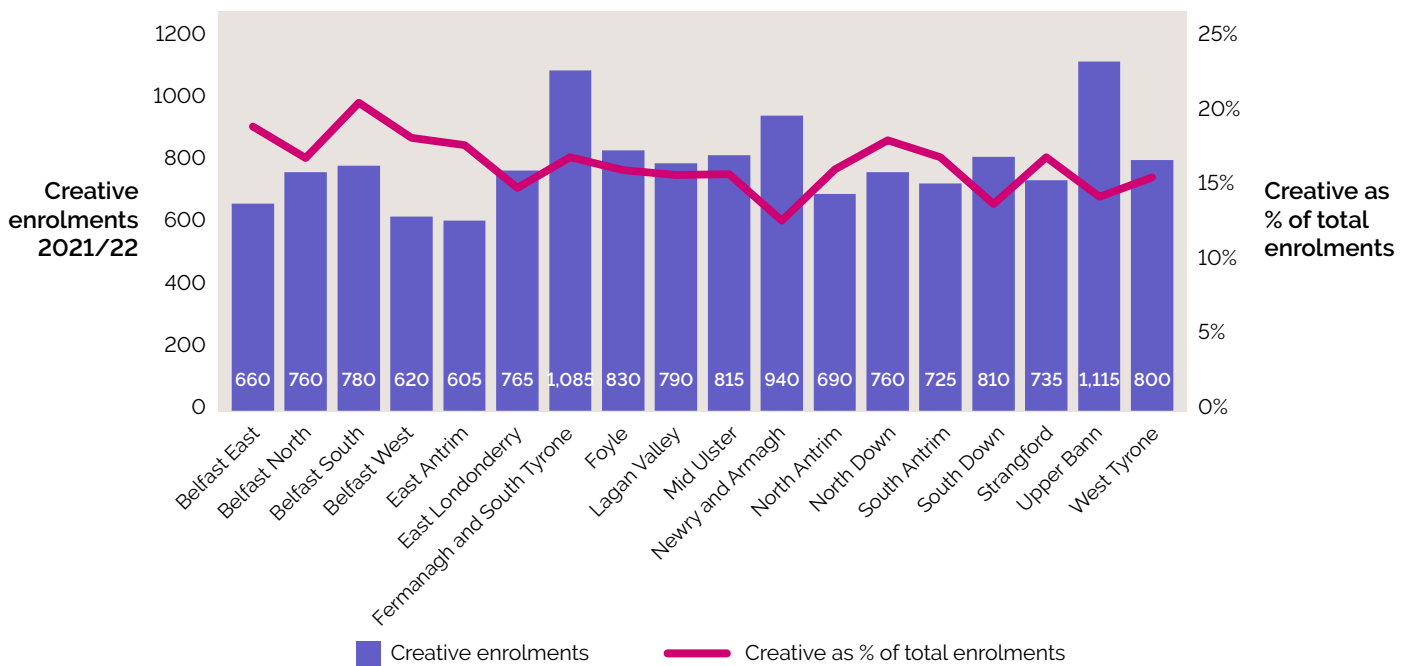Source: Authors' elaboration based on data from Department for the Economy (2023)

Notes: Creative enrolments include the following SSA Tier 1 categories: Arts, Media and Publishing; Languages, Literature and Culture; and Information and Communication Technology. Assembly area is based on the postcode provided by the student at the time of enrolment.

3.5: Profile of learners in creative FE in Northern Ireland

The report also explores the profile of learners in creative FE, where possible by gender, age, ethnicity, disability, and socioeconomic background, to understand whether learning opportunities are sufficiently diverse in Northern Ireland.

This is important in a context where the creative sector has been seeking to ensure it makes full use of the diversity of talent in the population. There is significant variation in the socioeconomic profile of learners enrolled in creative FE in Northern Ireland.

- Women were underrepresented on Information and Communication Technology courses – comprising just 30% of enrolments compared to 46% of all learners in FE. In contrast, women were overrepresented on Languages, Literature and Culture (comprising 62% of the student base) (Figure 3.12). The picture is more nuanced for Arts, Media and Publishing. When examining the data at a broad subject level (Tier 1 SSA), the gender profile of learners seems relatively balanced and in line with the picture across all disciplines. However, more detailed information is available through an Ad hoc Data Request published by the Department for the Economy at the request of Arts Council Northern Ireland. This shows that women comprise 7 in 10 learners studying Crafts, Creative Arts and Design (70%) but only one third (34%) of those enrolled on Media and Communication courses in FE (Figure 3.13).

- The analysis also explores the gender make-up of the apprenticeship student population. Given IT and Telecoms Professional constituted the vast majority of learners on apprenticeships aligned to the creative industries, and this sector tends to be male-dominated (Giles, Carey, & Spilsbury, 2020), it is perhaps less surprising that women comprised only a small proportion of those participating on programmes (17% of creative apprenticeships). This also compares less favourably to the gender composition of all apprenticeships (where 24% of students were female) (Figure 3.14).

- When examining other learner characteristics, we find a mixed picture. Around one fifth (21%) of the enrolments in the two selected creative SSAs had a disability or long-term health condition – broadly in line with all enrolments in FE in Northern Ireland (Department for the Economy, 2022) (Figure 3.15).[22] The proportion of learners with a disability was lowest in Other Languages, Literature and Culture (9%) and highest in Performing Arts and Media and Communication (both 25%).

- When examining the ethnic diversity of creative FE in Northern Ireland, we find enrolments in Languages, Literature and Culture of the British Isles the most ethnically diverse – 74% were white, 5% were black and 8% were of other ethnicity. In contrast, students enrolled on other creative disciplines were less ethnically diverse: those from black, Asian, mixed or other ethnic backgrounds comprised just 1 in 20 enrolments in Performing Arts (4%), Crafts, Creative Arts and Design (5%), Media and Communication (5%) and Other Languages, Literature and Culture FE courses (5%) (Figure 3.16).

- Sexual orientation was unknown for around a quarter of all enrolments in the two selected creative SSAs, with 64% identifying as heterosexual/straight and 10% bisexual/gay/lesbian/other. Crafts, Creative Arts and Design had the highest proportion of LGBT enrolments (18%) (Figure 3.17).

Figure 3.12: Regulated college-based FE enrolments (all ages) by Tier 1 SSAs and gender, 2022/23, Northern Ireland
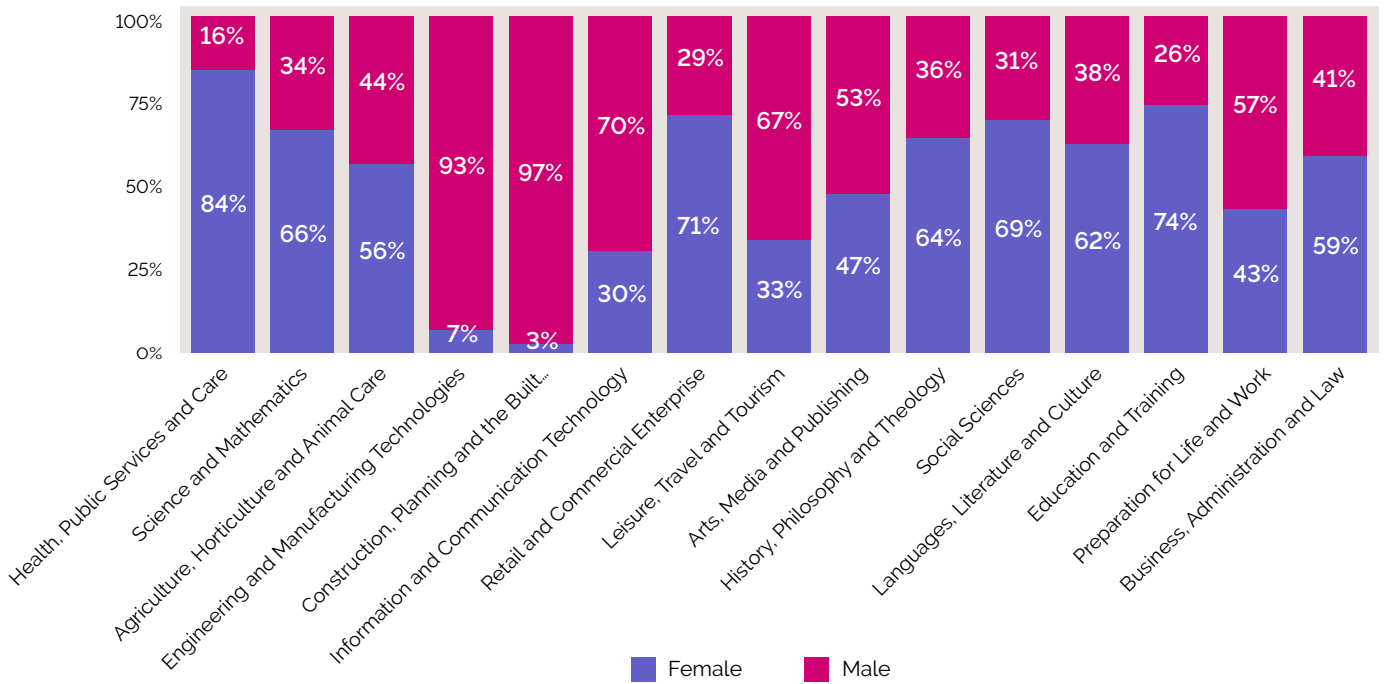
Figure 3.13: Regulated college-based FE enrolments (all ages) for selected Tier 2 SSAs and gender, 2021/22, Northern Ireland
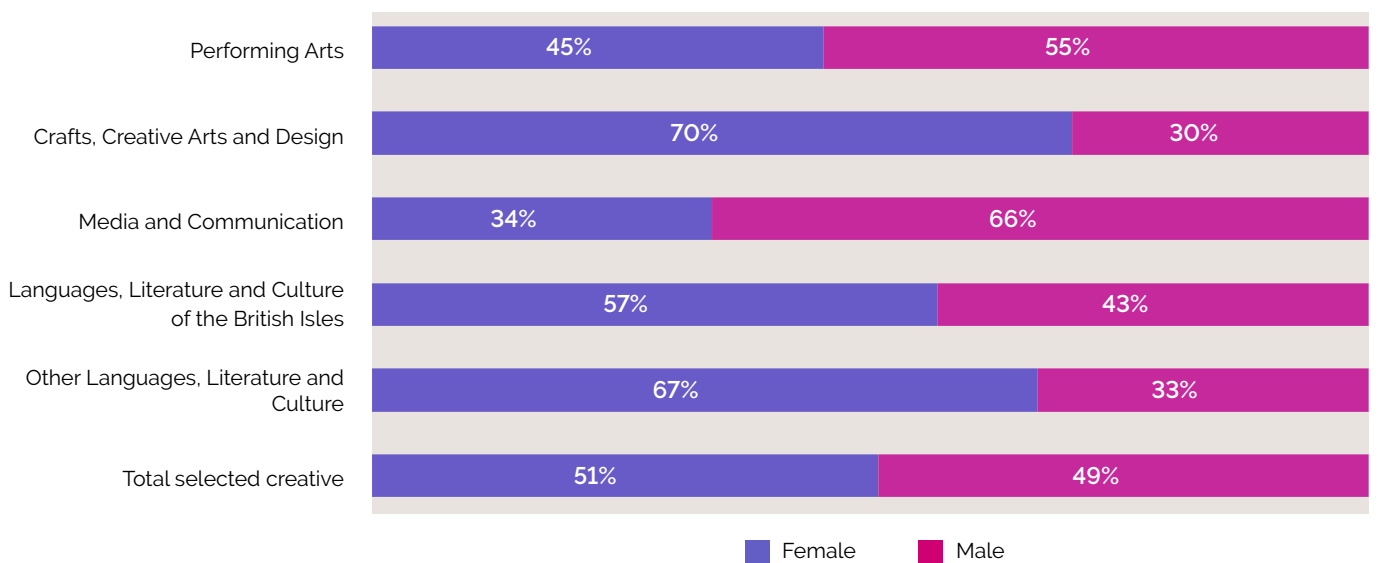
Note: Learner characteristics are self-reported.

Figure 3.14: ApprenticeshipsNI (all ages) by gender, 2021/22, Northern Ireland

Creative: Female 17%, Male 83%

Total: Female 24%, Male 76%

Source: Authors' elaboration based on data from Department for the Economy (2022a), Worksheet 2_2

Figure 3.15: Regulated college-based FE enrolments (all ages) for selected Tier 2 SSAs and disability, 2021/22, Northern Ireland

	% with a disability or health condition
Performing Arts	25%
Crafts, Creative Arts and Design	21%
Media and Communication	25%
Languages, Literature and Culture of the British Isles	17%
Other Languages, Literature and Culture	9%
Total selected creative	21%

■ % with a disability or health condition
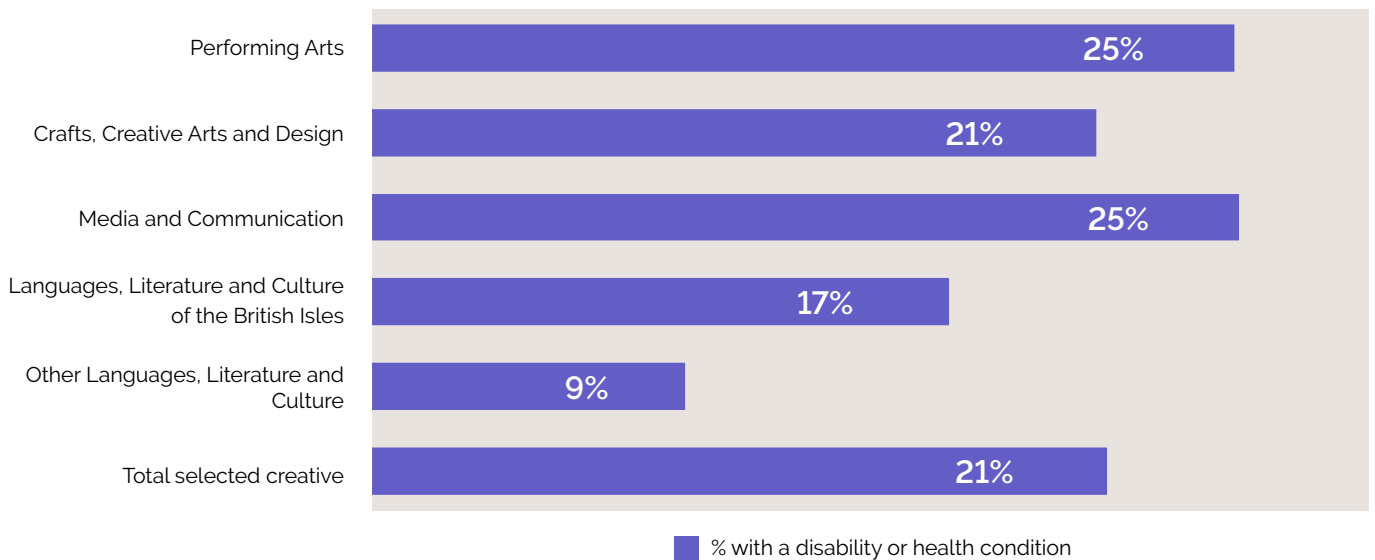
Source: Authors' elaboration based on data from Department for the Economy (2024b), Table 34
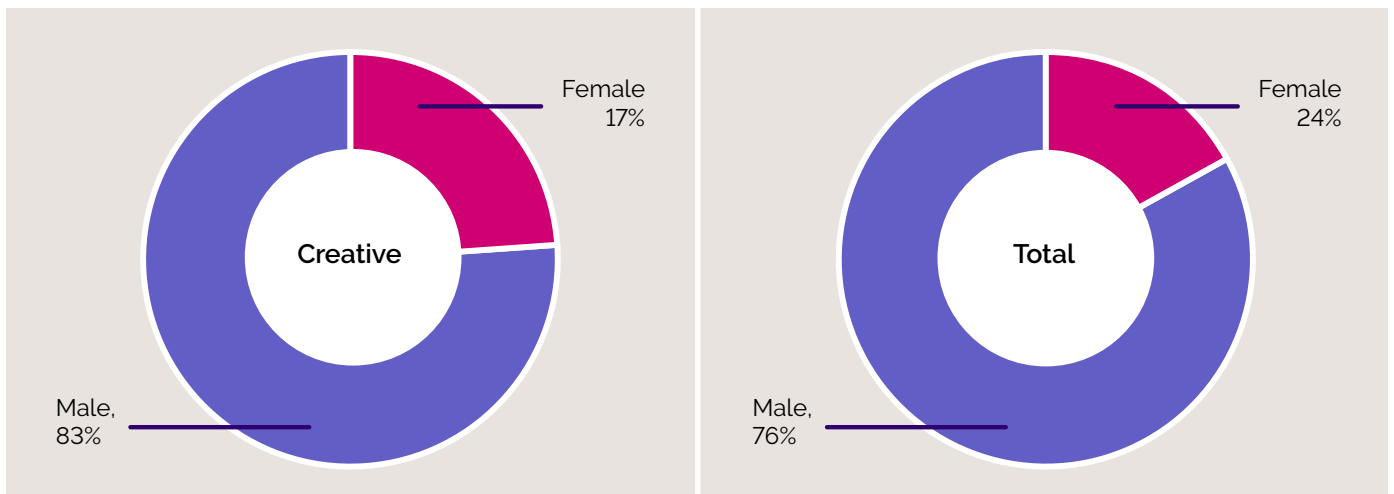
Note: Learner characteristics are self-reported.

Figure 3.16: Regulated college-based FE enrolments (all ages) for selected Tier 2 SSAs and ethnicity, 2021/22, Northern Ireland

	White	Black	Asian	Other	Unknown
Performing Arts	86%				
Crafts, Creative Arts and Design	85%				
Media and Communication	89%				
Languages, Literature and Culture of the British Isles	74%				
Other Languages, Literature and Culture	89%				
Total selected creative	81%				

Source: Authors' elaboration based on data from Department for the Economy (2024b), Table 34

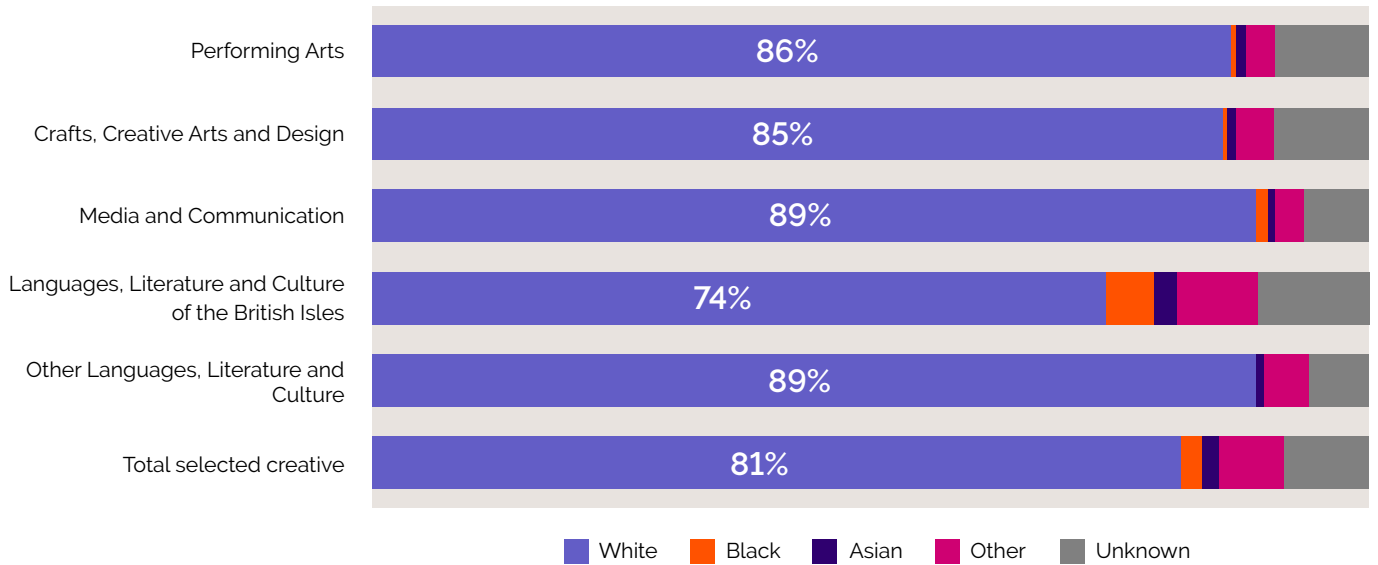**Figure 3.17: Regulated college-based FE enrolments (all ages) for selected Tier 2 SSAs and sexual orientation, 2021/22, Northern Ireland**

	Heterosexual/Straight	Bisexual/Gay/Lesbian/Other	Unknown
Performing Arts	58%	16%	26%
Crafts, Creative Arts and Design	53%	18%	28%
Media and Communication	63%	14%	22%
Languages, Literature and Culture of the British Isles	65%	11%	24%
Other Languages, Literature and Culture	64%	8%	28%
Total selected creative	64%	10%	26%

Source: Authors' elaboration based on data from Department for the Economy (2024b), Table 44

Note: Learner characteristics are self-reported.

3.6: Learner outcomes and destinations in Northern Ireland

It has also been of interest to explore variations in learner outcomes, including rates of achievement and learner destinations.[23]

Over the past five years, retention rates in creative FE in Northern Ireland have, in some cases, fallen short of the FE average. While retention rate among students enrolled on Arts, Media and Publishing courses has closely followed the average across all disciplines (91% in 2022/23), it has been consistently lower in Information and Communication Technology courses (88%) and Languages, Literature and Culture courses (85%) than the average across all learners in FE in Northern Ireland (90%) (Figure 3.18).

The success rate is recognised as the overall measure of performance. In 2022/23,

Arts, Media and Publishing had the highest success rate of the creative subjects, at 81%, which exceeded the total success rate for all subjects (77%) as well as the rates for the other creative course categories (Information and Communication Technology, 78%, and Languages, Literature and Culture, 73%) (Figure 3.20).

While retention and success rates have been largely consistent over the past five years, both have been impacted by the Covid-19 pandemic, rising until 2019/20 and then declining in the years since (see figures 3.18 and 3.19).

Figure 3.18: Retention rate of final year regulated college-based FE enrolments (all ages) for creative Tier 1 SSAs 2018/19 to 2022/23, Northern Ireland

Legend: Information and communication technology; Arts, media and publishing; Languages, literature and culture; Total

Source: Authors' elaboration based on data from Department for the Economy (2022b), Table A36

Notes: A student can enrol on a course that is multiple years in length, but will only have the opportunity to achieve a qualification within the final year of that course. Enrolments of students on a one-year course or in the second year of a two-year course are regarded as final year enrolments. The retention rate is defined as the percentage of final year regulated enrolments completed by students. The success rate is defined as is the percentage of final year regulated enrolments of students who complete and achieve a qualification.

Figure 3.19: Success rate of final year regulated college-based FE enrolments (all ages) for creative Tier 1 SSAs, 2018/19 to 2022/23, Northern Ireland

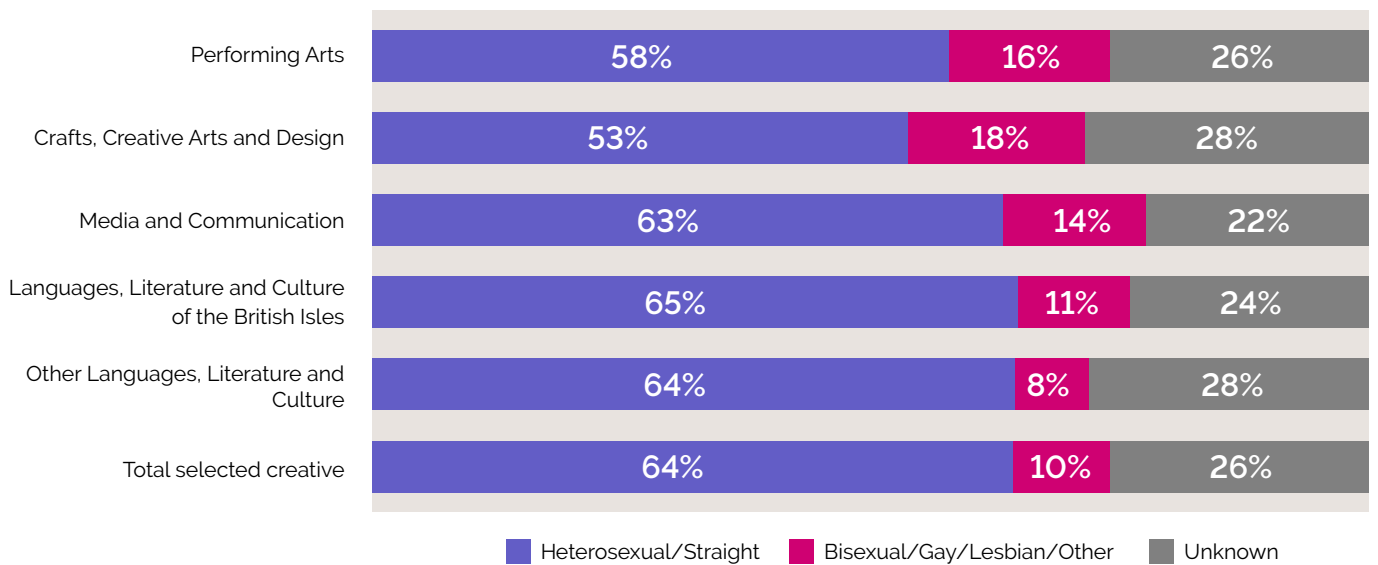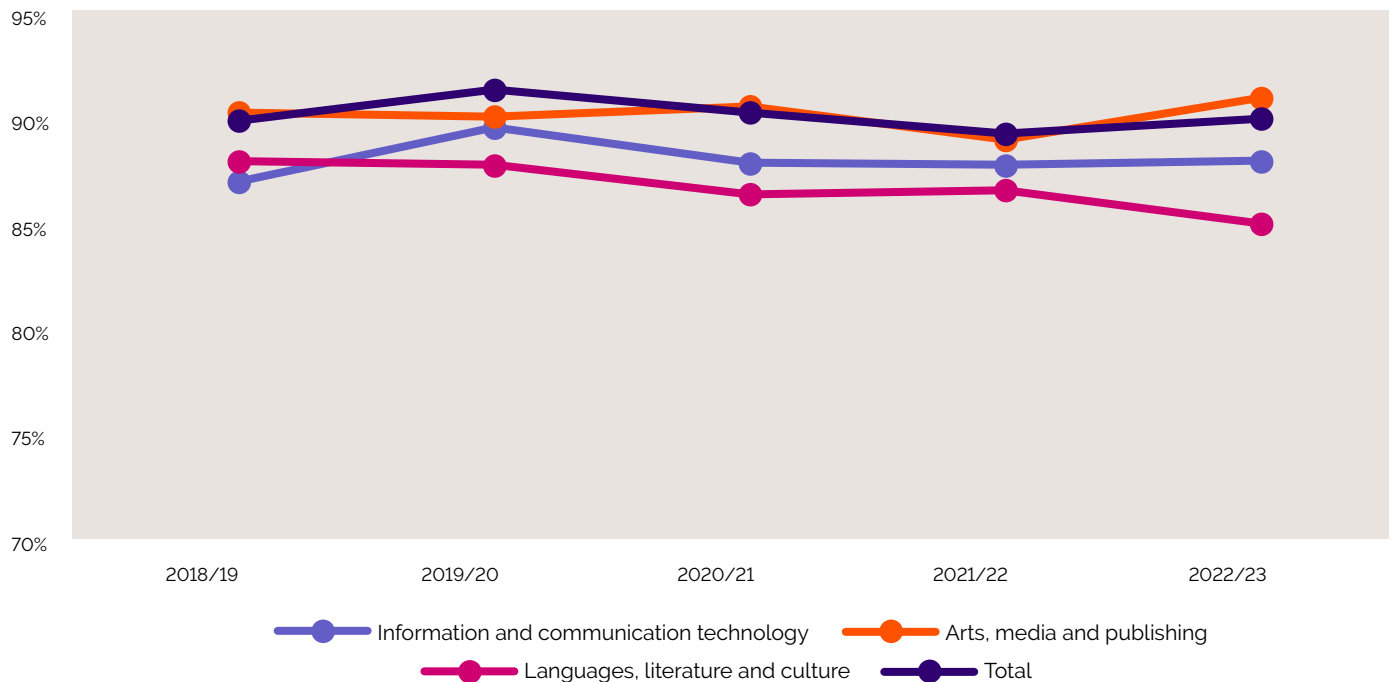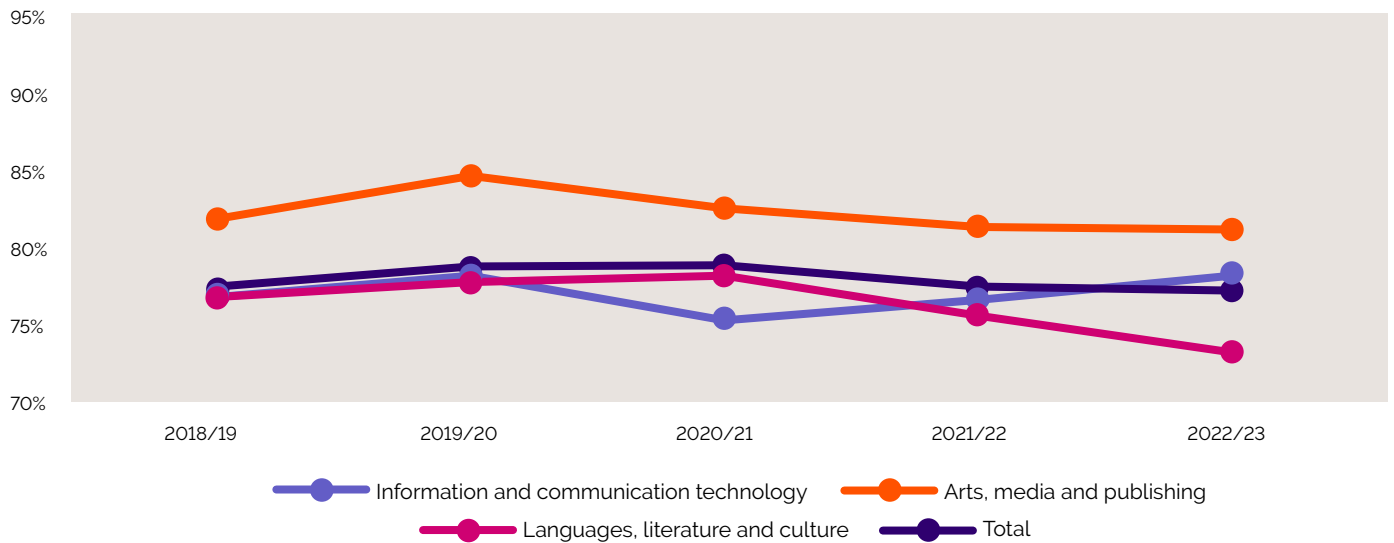Source: Authors' elaboration based on data from Department for the Economy (2022b), Table A36

Figure 3.20: Success rate of final year regulated college-based FE enrolments (all ages) by Tier 1 SSAs, 2022/23, Northern Ireland

Source: Authors' elaboration based on data from Department for the Economy (2022b), Table A36
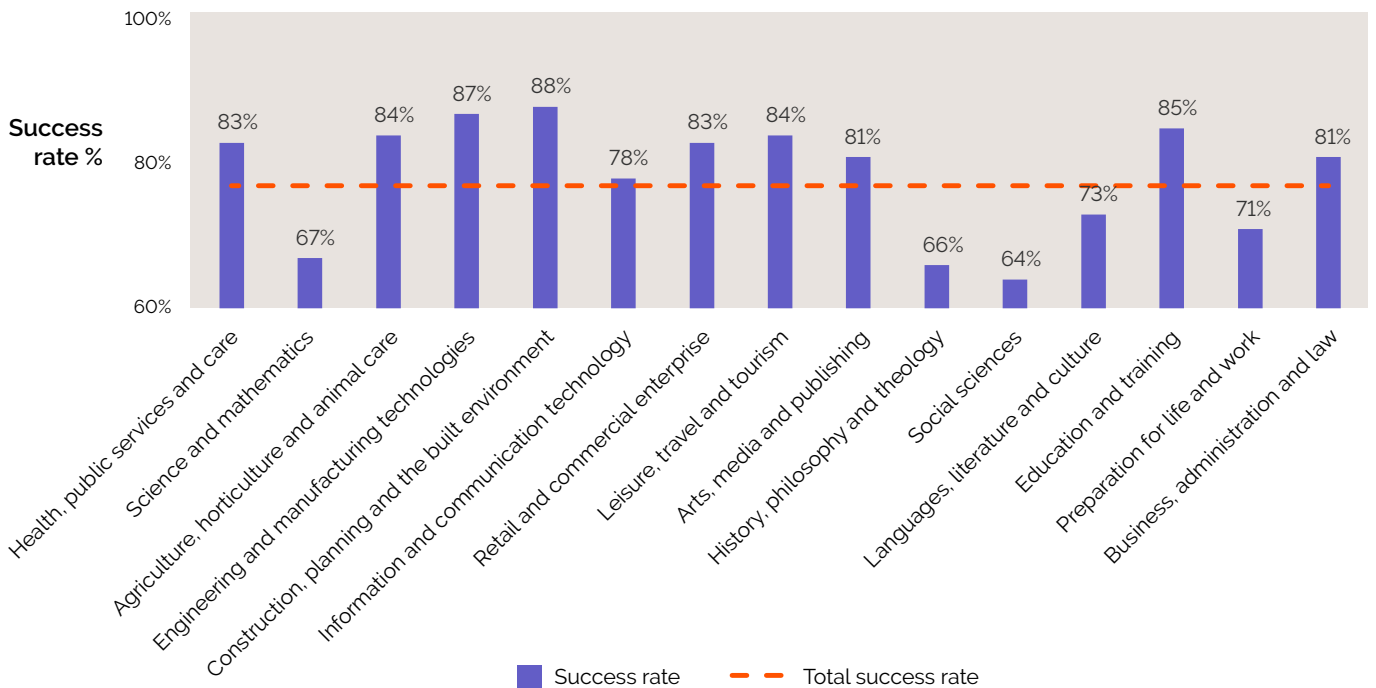
Notes: A student can enrol on a course that is multiple years in length, but will only have the opportunity to achieve a qualification within the final year of that course. Enrolments of students on a one-year course or in the second year of a two-year course are regarded as final year enrolments. The retention rate is defined as the percentage of final year regulated enrolments completed by students. The success rate is defined as is the percentage of final year regulated enrolments of students who complete and achieve a qualification.

In addition, the report has been able to review information on the destinations of FE college leavers after completing and achieving a regulated qualification at an FE college in Northern Ireland. Destination data is provided by the Survey of Further Education College Leavers (Department for the Economy, 2022).[24]

As in other nations, we find distinct differences in the destinations of those completing FE courses aligned to the creative industries compared to learners in other disciplines. Indeed, while students who completed Information and Communication Technology courses generally followed a path similar to all learners – where around half moved into employment and around four in ten moved into to further study (38% in the case of ICT students) – the picture was markedly different for students completing Arts, Media and Publishing courses. Indeed, 7 in 10 students who completed Arts, Media and Publishing continued on to further study, while only 1 in 5 started working. This was the highest share of learners of any discipline continuing their studies, exceeding subjects such as Social Sciences (68%) and History, Philosophy and Theology (67%) (Figure 3.21).

Figure 3.21: Destinations after course of FE college leavers (all ages), 2020/21, Northern Ireland

Source: Authors' elaboration based on data from Department for the Economy (2022c), Table A18

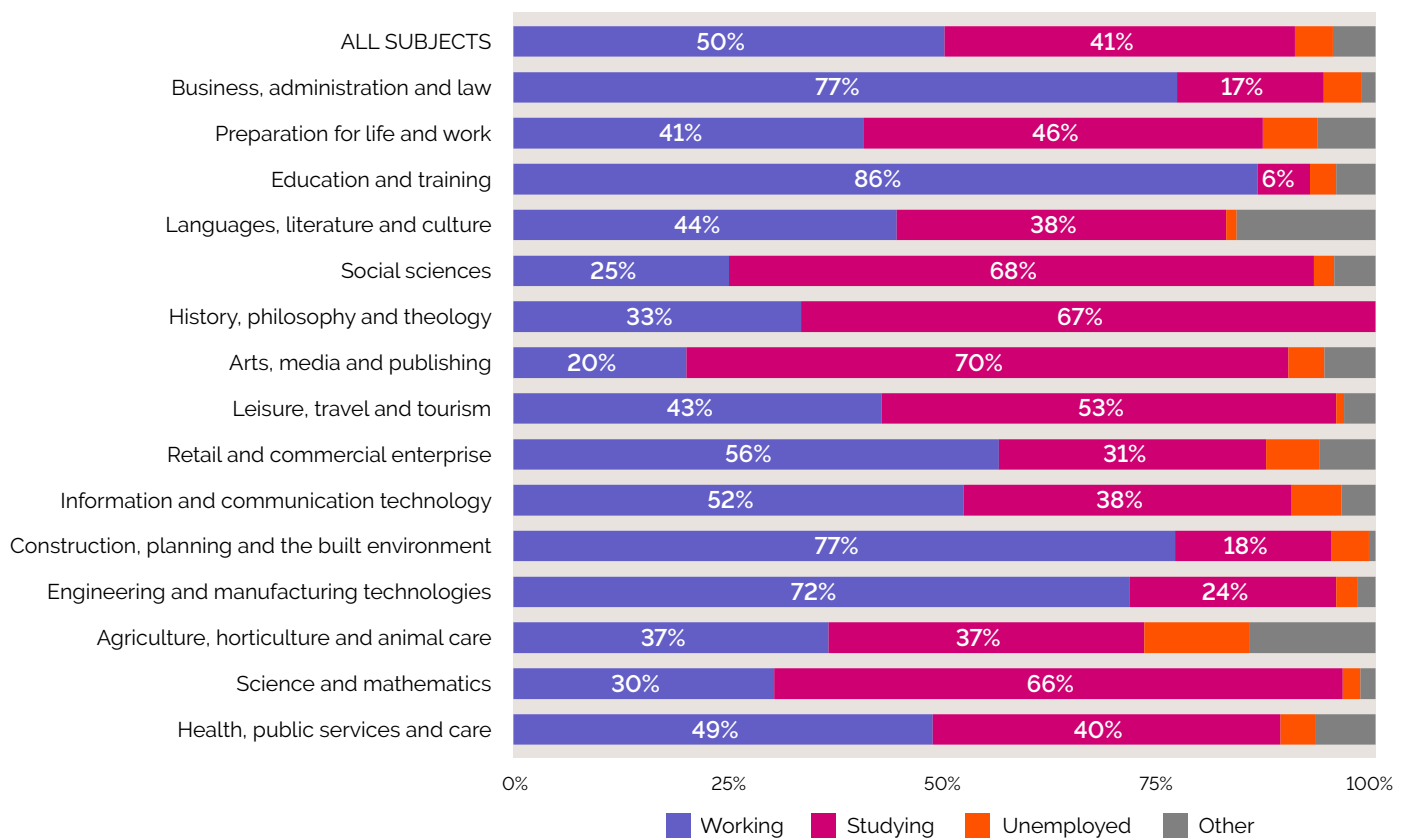Notes: Based on the Survey of Further Education College Leavers. Includes all individuals who completed and achieved at least one regulated qualification at Level 3 or below during the 2020/21 academic year at one of Northern Ireland's FE colleges. Survey responses were collected approximately six to nine months after course completion. 'Working' refers to FE college leavers in paid or self-employment, or primarily working but also studying, six months after course completion; 'Studying' refers to those undertaking additional learning six months after course completion; and 'Unemployed' refers to those who were unemployed and looking for work six months after their course. 'Other' includes respondents who were retired, those with caring responsibilities or a long-term illness, or those who were taking time out to travel.

4 Creative further education in Wales

4.1: Labour market and policy context in Wales

The creative industries in Wales continue to be recognised as key priority sectors by the Welsh Government. This is a reflection not only of their strong economic performance but also their role in building well-being and a strong Welsh culture and national brand to promote Wales and its national identity (Creative Wales, 2022).

Despite the harsh economic conditions recently and the effects of the pandemic, building on the economic shocks of the financial crisis and Brexit, the sector has shown signs of resilience. In 2022, the creative industries generated an annual turnover of £1.4 billion, and the number of creative businesses registered in Wales has continued to grow over the past five years, increasing to 3,545 in 2022 – equivalent to 3.3% of all registered businesses in Wales and employing 32,500 people. This represents an 8.9% growth in registered businesses since 2017 (WG, 2023). Furthermore, wider evidence (Miklos Fodor et al, 2023) taking account of creative freelancers suggests the creative industries in Wales have not only recovered from the impact of Covid-19 but are growing faster than the rest of the Welsh economy. Indeed, the same research estimates the creative workforce to be around 45,000 workers, presenting strong prospects for the future.

The long-term strategic skills priorities in Wales have been set out most recently within the Welsh Government's Plan for Employability and Skills for a Stronger, Fairer and Greener Wales (WG, 2022a). This outlines a programme of work that will be monitored annually up to 2050 (WG, 2022b) and is centred around five key areas of action: championing fair work for all; enabling young people to realise their potential; tackling economic inequality; supporting people with a long-term health condition to work; and nurturing a learning for life culture. A core objective of this Plan is to reform the post-compulsory education and skills system so that it can strengthen education pathways beyond schools and raise the level and relevance of skills and training in the future, with important implications for further education (FE) as well as the system more generally. Relatedly, this has a key role in: increasing the skills of the Welsh working population to Level 3 or higher to support their employability and progression; creating new routes for people into growing professional and technical roles where there are persistent skills shortages, especially in middle skills; widening participation and tackling social exclusion; and improving employer practices with better skills development and use, enhancing fair work, productivity and economic growth.

At the heart of the proposals is the establishment of a new Commission for Tertiary Education and Research to provide strategic leadership over skills investments. A core goal is to achieve a more effective balance between different education and vocational pathways across FE, HE and vocational education that best meets the needs of the workforce and employers (WG, 2022a). There is also an enhanced role for the Regional Skills Partnerships to identify regional economic and skills priorities and better inform the customisation of local programmes and deployment of skills funding through stronger regional partnerships, involving schools, colleges, universities, employers and wider providers.[25] These priorities have been further strengthened in the last year through policy commitments such as Apprenticeships: Policy Statement (WG, 2024) and the Net Zero Skills Action Plan (WG, 2023). In turn, they also build on previous reviews, strategies and skills priorities.[26]

Crucially, with this report in mind, it has been important to also note policy developments to align skills priorities more closely to the Welsh economic strategy and long-term investments for growth, including in key sectors such as the creative industries. While the early foundations for the current economic mission were set in 2017 with Prosperity for All: Economic Action Plan, (WG, 2017) these have been updated, first through the 'Economic resilience and reconstruction mission' following the pandemic in 2021 (WG, 2021) and most recently in 2023 through Economic Mission: Priorities for a Stronger Economy (WG, 2023). In such a context, the creative industries are seen as a key priority for growth – developing long-term partnerships in skills and vocational training such as apprenticeships – as well as innovation, R&D and entrepreneurship. Indeed, such developments have been growing functions of Creative Wales since its establishment.

Taking a closer look at FE, the Welsh Government is responsible for publicly funded FE and training in Wales. The nature and composition of FE is heavily guided by legislation, as well as being informed by regional and local networks, including requirements and priorities set by Regional Skills Partnerships.[27] There are currently 13 FE institutions in Wales, operating as the main providers of general and vocational FE, supporting the attainment of qualifications from entry level through to Level 5, and wider work-based learning (WBL) programmes.[28] Examples of qualifications include: General Certificate of Education (GCSE) qualifications; A levels; extended diplomas; National Vocational Qualifications; qualifications preparing individuals for life and work; and professional qualifications.[29] In many cases, FE institutions also offer the Level 3 Advanced Skills Challenge Certificate, often referred to as the Welsh Baccalaureate – this is now being replaced by the Advanced Skills Baccalaureate Wales. This offers provision to support individuals to enhance their levels of numeracy and literacy, such as via the Essential Skills Wales qualifications.

Apprenticeship provision and training attached to employability services are the key programmes supporting WBL in Wales. There are 10 WBL providers recognised by the Welsh Government to deliver apprenticeship frameworks, with six of these involving FE college-led partnerships. In turn, there are five WBL providers offering employability training provision through the Jobs Growth Wales+ employability programme.[30] Three of these are FE college-led consortia. In 2022/23, there were 45,275 full-time unique learners and 60,510 part-time learners, and 21,215 learners undertaking WBL in FE institutions (WG, 2024). Over the last decade, there has consistently been a slightly higher share of learners aged 25 and over (57% of learners in 2022/23).

4.2: Participation in creative FE in Wales

FE data in Wales typically relates to Learning Activities undertaken by recognised Welsh FE providers.

The data includes: WBL provision at FE institutions on a consortium member basis and local authority community learning where there is a formal enrolment with an FE institution.[31] The data is obtained using the Lifelong Learning Wales Record. As for Northern Ireland and England, sector subject areas (SSAs) are just used to aggregate Qualifications and Curriculum Authority (QCA)-defined learning areas, albeit with some amendments to promote consistency with Estyn statistics.

It is not possible to directly map Tier 1 SSAs to creative industries. As such, the analysis focuses on three of the largest categories for creative FE: Arts, Media and Publishing; Languages, Literature and Culture; and Information and Communication Technology. Where data is

available by Tier 2 SSAs, additional analysis has been conducted – this includes: Architecture (in the Construction, Planning and the Built Environment category); and Marketing and Sales (in the Business, Administration and Law group).[32] In 2022/23, there were 39,460 creative FE learning activities – equivalent to 10% of all FE provision. These creative activities comprised: 13,335 on Arts, Media and Publishing courses (34% of enrolments on creative FE); 11,170 on Information and Communication Technology courses (28%); and 14,360 on Languages, Literature and Culture courses (36%) (Figure 4.1). In addition, there were 50 participants on Architecture courses and 550 on Marketing and Sales courses, which fall within other Tier 1 SSAs.

Figure 4.1: Learning activities at FE institutions (all ages) by Tier 1 SSAs, 2022/23, Wales
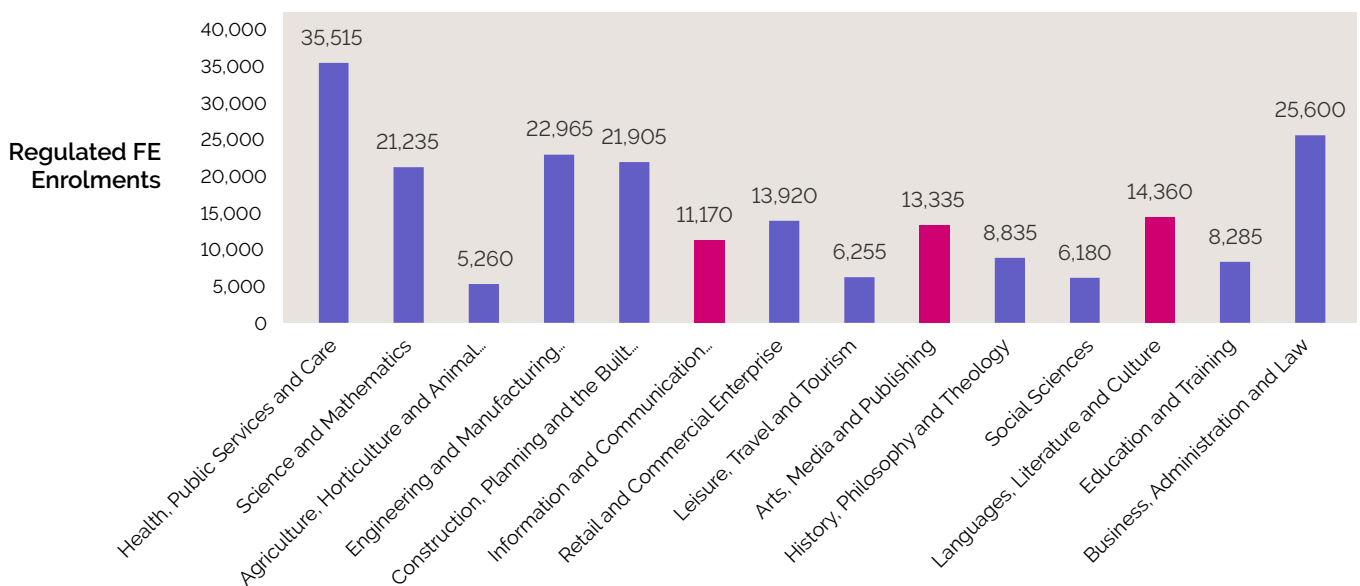
Source: Authors' elaboration based on data from StatsWales (2024a)

Notes: Figures are the number of learning activities at FE institutions in Wales, including WBL provision at FE institutions on a consortium member basis and Local Authority (LA) community learning where there is a formal enrolment at an FE institution. Data excludes FE provision through school sixth forms, HE institutions and private providers. Figure excludes Preparation for Life and Work (173,390) for formatting purposes.

The majority (59%) of creative FE learning activities were at National Qualifications Framework level 2 and 3 or equivalent (Figure 4.2) – this was a higher share than for all FE learning activities (51%). A closer examination of the make-up of these broad creative subject areas suggests Arts, Media and Publishing learning activities consisted of: 21% Performing Arts; 54% Crafts, Creative Arts and Design; and 25% Media and Communications. Furthermore, the majority of Languages, Literature and Culture activities were in Languages, Literature and Culture of the British Isles (82%). Information and Communication Technology was split fairly evenly between ICT Practitioners (46%) and ICT for Users (47%).

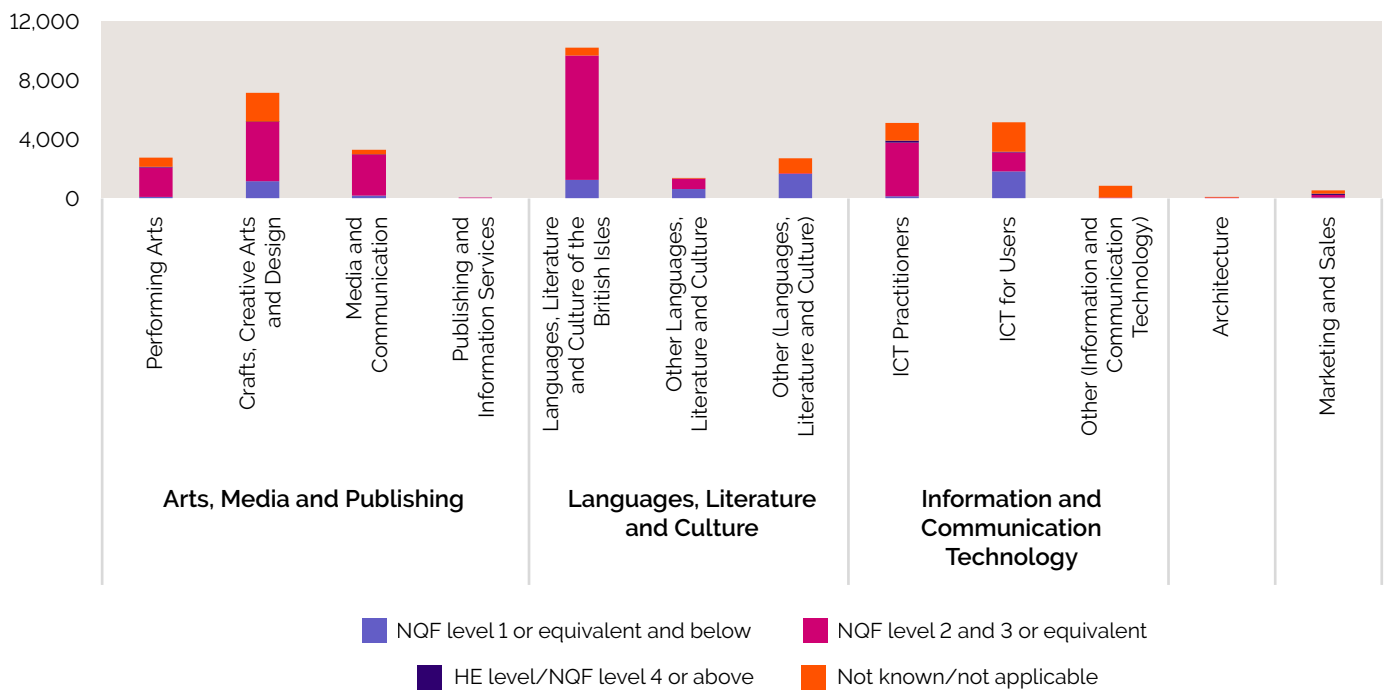Figure 4.2: Creative learning activities at FE institutions (all ages) by Tier 2 SSAs and level, 2022/23, Wales

Source: Authors' elaboration based on data from StatsWales (2024)

Notes: Figures are the number of learning activities at FE institutions in Wales, including WBL provision at FE institutions on a consortium member basis and Local Authority (LA) community learning where there is a formal enrolment at an FE institution.

An examination of the take-up of different apprenticeship programmes in Wales also provides an opportunity to explore those pathways which secure industry-recognised qualifications and training to develop job-specific skills.[33] This training is often provided while working and earning a wage. Apprenticeships in Wales exist at different levels:

- **Foundation Apprenticeships (FAs)** – working towards a Level 2 qualification (equivalent to GCSE A*–C);

- **Apprenticeships** – working towards a Level 3 qualification (equivalent to A levels);

- **Higher Apprenticeships** – involving a higher qualification of Level 4 and above, this could be a Higher National Certificate/Higher National Diplomas or foundation degree;

- **Degree Apprenticeships** – at Level 6, equivalent to a full bachelor's degree, they combine working with studying part time at a university or college.

Activities are delivered through approved Welsh apprenticeship frameworks, which are available in 23 sectors.[34] These frameworks are reviewed and developed by the Welsh Government within a three-year timetable, and to ensure they meet industry standards, they are developed in partnership with industry bodies such as ScreenSkills. Apprenticeship frameworks directly relevant to the creative industries are: Creative and Digital Media; IT Users; IT, Software, Web and Telecoms Professionals; Social Media and Digital Marketing; and Other Media and Design.

While the Welsh Government has been encouraging the take-up of apprenticeships over the last decade, there remain low levels of participation in creative subjects. In 2022/23, there were only 325 apprenticeship starts at levels 2 and 3,[35] which comprised less than 2% of the total level of starts for that year (18,525 apprenticeship starts at levels 2 and 3). Furthermore, there were only 60 Higher Apprenticeship starts, in creative subjects almost all in Social Media and Digital Marketing (Figure 4.3). This formed around 1% of all Higher Apprenticeship starts (4,355 overall).

Figure 4.3: Selected apprenticeship starts (all ages), 2022/23, Wales

Source: Authors' elaboration based on data from StatsWales (2024)

Notes: Apprenticeship learning programmes started in WBL in Wales. The data includes WBL that is delivered by FE institutions and also WBL delivered by other training providers.

4.3: Trends over time in creative FE

The analysis has also enabled an assessment of trends in creative learning at FE institutions in Wales over time, reviewing levels of participation between 2012/13 and 2022/23.
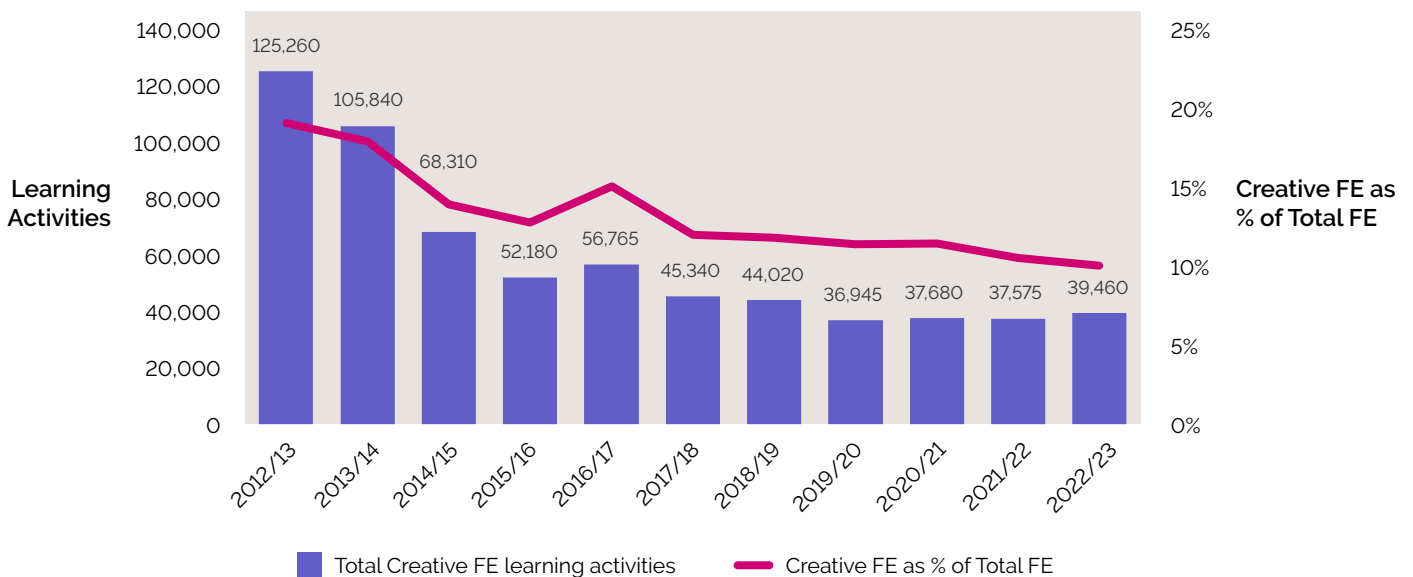
In this period, the Welsh Government called for a growth in skills development and lifelong learning to meet ongoing developments in a future world of work. Despite this, there has been a persistent overall decline in FE learning activities over the past decade, which brings with it risks for the general development of skills for the Welsh economy, as well as for specific creative skills for the creative industries.

While overall levels of participation in FE learning fell by 40% (from 656,285 in 2021/13 to 391,795 in 2022/23), creative FE learning activities declined by an even greater degree: from 125,260 in 2012/13 to 39,460 in 2022/23, representing a decline of 68% over the past 10 years (Figure 4.4). As a result, there has been a concomitant fall in creative FE activities as

a share of total FE activities, from a 19% share in 2012/13 to 10% in 2022/23. The largest reduction in learning activity occurred between 2012/13 and 2015/16. Since then, the numbers have somewhat stabilised. That said, there was a small dip coinciding with the pandemic and in 2022/23 there was a small increase in activities from the previous year.

A closer examination of creative subjects reveals the largest falls were in ICT for Users (-86%); Other Languages, Literature and Culture (-83%); and Publishing and information Services (-82%). Only two SSA Tier 2 creative subject areas increased learning activities over the last 10 years: these were Marketing and Sales (+134%); and Other ICT (+9%) (Figure 4.5).

Figure 4.4: Creative learning activities at FE institutions (all ages), 2012/13 to 2022/23, Wales

Source: Authors' elaboration based on data from StatsWales (2024b)

Notes: Figures are the number of learning activities at FE institutions in Wales, including WBL provision at FE institutions on a consortium member basis and Local Authority (LA) community learning where there is a formal enrolment at an FE institution. Creative FE learning activities are defined as the following Tier 2 SSAs: Performing Arts; Crafts, Creative Arts and Design; Media and Communication; Publishing and Information Services; Languages, Literature and Culture of the British Isles; Other Languages, Literature and Culture; ICT for Practitioners; ICT for Users; Other ICT; Architecture; and Marketing and Sales.
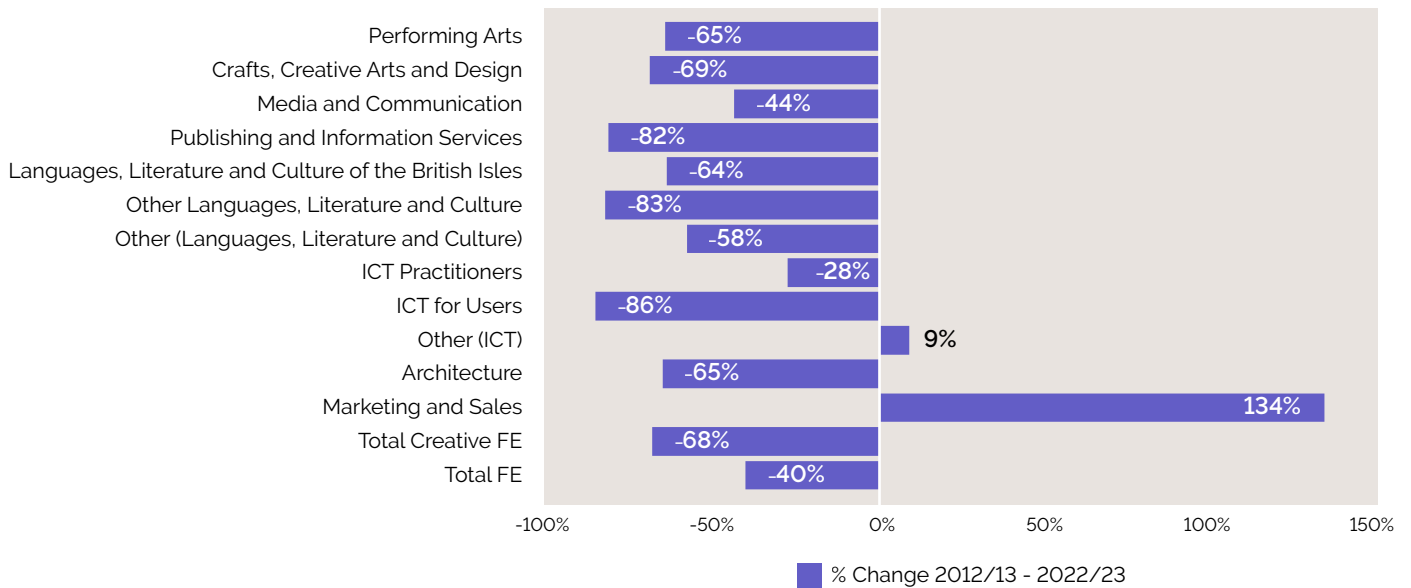
Figure 4.5: Percentage change in creative learning activities at FE institutions (all ages) by Tier 2 SSAs, 2012/13 to 2022/23, Wales

Source: Authors' elaboration based on data from StatsWales (2024b)

Notes: Figures are the number of learning activities at FE institutions in Wales, including WBL provision at FE institutions on a consortium member basis and Local Authority (LA) community learning where there is a formal enrolment at an FE institution. Creative FE learning activities are defined as the following Tier 2 SSAs: Performing Arts; Crafts, Creative Arts and Design; Media and Communication; Publishing and Information Services; Languages, Literature and Culture of the British Isles; Other Languages, Literature and Culture; ICT for Practitioners; ICT for Users; Other ICT; Architecture; and Marketing and Sales.

Trends in the take-up of apprenticeships mirror those for FE learning activities, albeit declining at a slower pace. Across all frameworks and levels, apprenticeship numbers have fallen significantly from 28,030 in 2012/13 to 22,880 in 2022/23 – equivalent to a reduction of 18%. The numbers taking apprenticeships related to the creative industries have been declining at more than three times this pace, falling from 915 to 395 over the past decade (-57%) (Figure 4.6).

Beyond the headline figures, there have been some notable shifts in patterns of WBL. For instance, there has been an increase in

Higher Apprenticeships – there was no take-up in 2012/13 but 60 apprenticeships in 2022/23. There has also been a change in the distribution of creative apprenticeships. For example, in 2012/13 IT User apprenticeships made up 87% of creative apprenticeships. However, by 2022/23 this had fallen to just 6%, and at the same time the majority of apprenticeship starts had moved to Social Media and Digital Marketing (48%) and IT, Software, Web and Telecoms Professionals (32%) (figures 4.6 and 4.7).

Figure 4.6: Creative apprenticeship starts (all ages) by framework subjects, 2012/13 to 2022/23, Wales
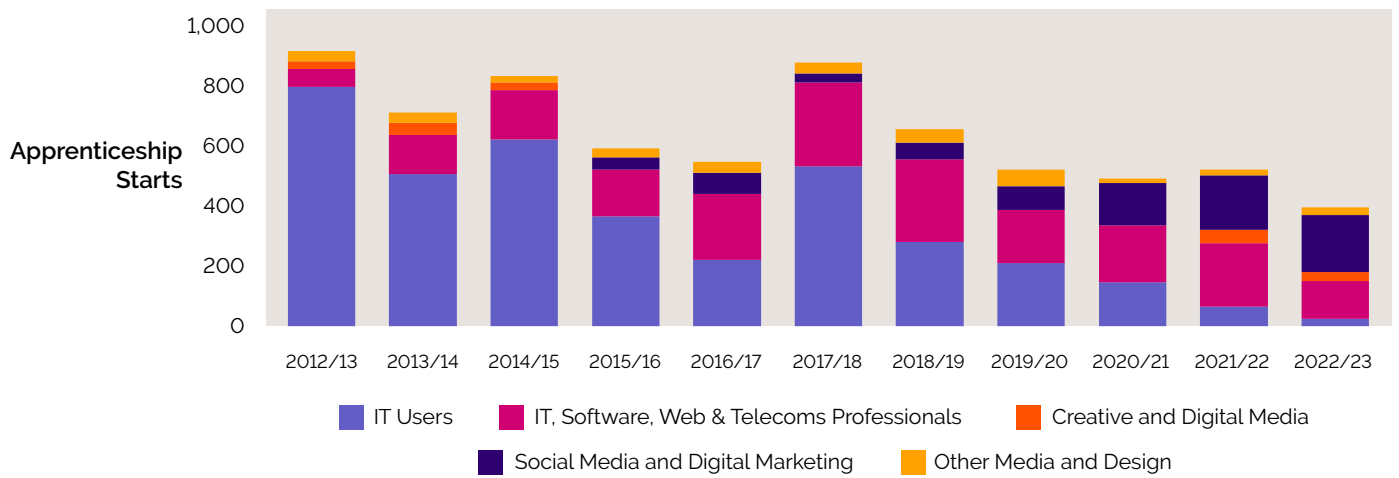
Source: Authors' elaboration based on data from StatsWales (2024d)

Figure 4.7: Creative apprenticeship starts (all ages) by framework level, 2012/13 and 2022/23, Wales
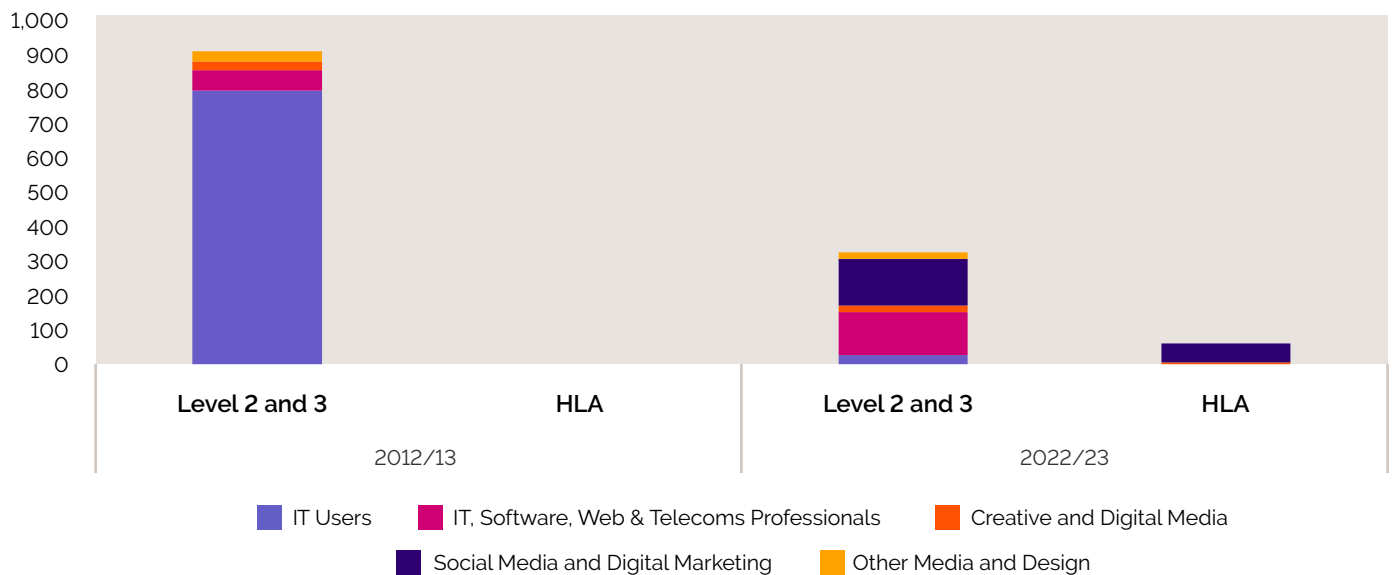
Source: Authors' elaboration based on data from StatsWales (2024d)

Notes: Apprenticeship learning programmes started in WBL in Wales. The data includes WBL that is delivered by FE institutions and also WBL delivered by other training providers.

4.4: Spatial patterns of creative FE in Wales

The research has also aimed to explore spatial patterns in creative FE within Wales to understand variations in major providers in different parts of the country and specific creative clusters.

This has considered variations in creative FE learning activities[36] between the 22 local authorities in Wales and the four Welsh regions – that is, North Wales, Mid Wales, South West Wales and South East Wales – which align to the four Regional Skills Partnerships regions.[37]

This analysis echoes the spatial patterns of learning seen in other UK nations, finding

concentrations of creative learning activities in more urban parts of Wales, including in Cardiff (4,475), Swansea (4,180) and Neath Port Talbot (3,445). However, when creative activities are considered as a proportion of all FE learning, creative learning is more significant in Pembrokeshire (13%) and Ceredigion (13%) relative to wider learning activities (Figure 4.8).

Figure 4.8: Creative learning activities at FE institutions (all ages) by local authority, 2022/23, Wales
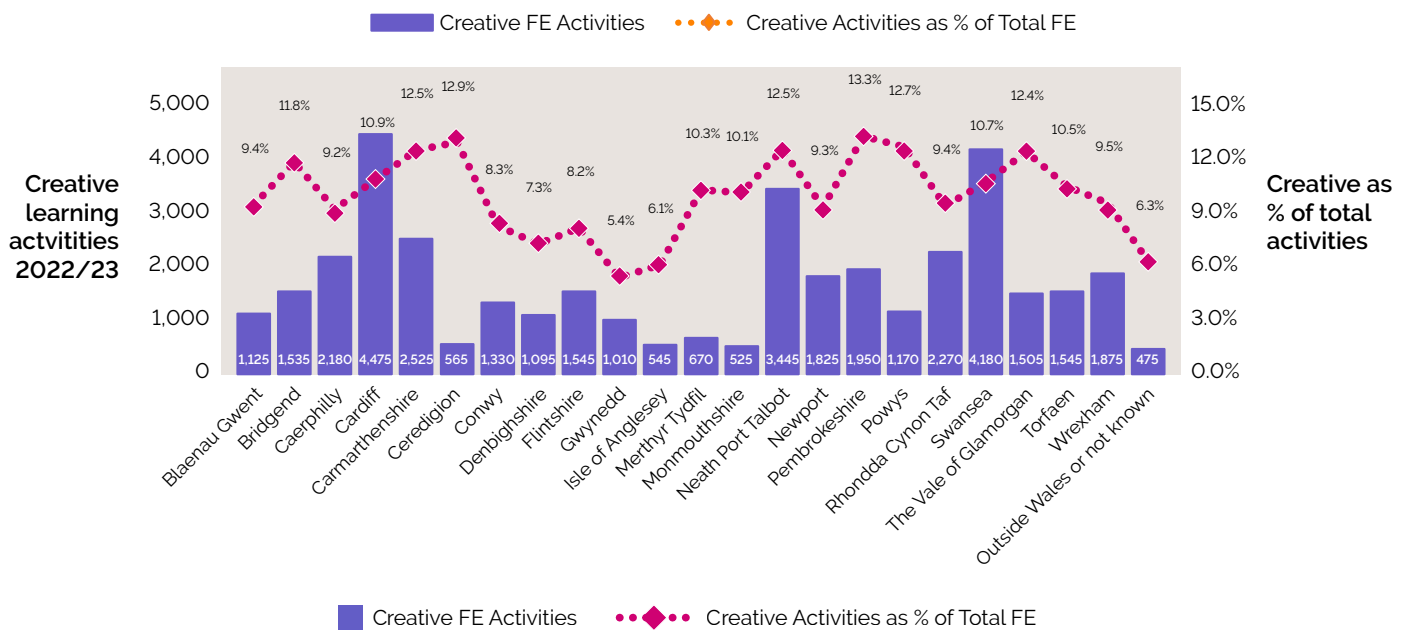
Source: Authors' elaboration based on data from StatsWales (2024c)

Notes: Local authority of domicile of the learner is calculated using their recorded home postcode. Creative FE learning activities are defined as the following Tier 2 SSAs: Performing Arts; Crafts, Creative Arts and Design; Media and Communication; Publishing and Information Services; Languages, Literature and Culture of the British Isles; Other Languages, Literature and Culture; ICT for Practitioners; ICT for Users; Other ICT; Architecture; and Marketing and Sales.

4.5: Profile of learners in creative FE in Wales

The report explores the profile of learners in creative FE to understand whether learning opportunities are sufficiently diverse in Wales.

This is important in a context where the creative sector has been seeking to make sure it makes full use of the diversity of talent in the population. The data available suggests significant disparities in the gender composition of learners in creative FE at SSA Tier 2 and apprenticeships. For example, in 2022/23, there was a higher incidence of male learners among ICT Practitioners (77%) and Other ICT activities (75%). In contrast, female learners were overrepresented in other creative subjects, such as: Crafts, Creative Arts and Design (73%),

Marketing and Sales (72%) and Publishing and Information Services (71%) (Figure 4.9).

The gender profile for creative apprenticeship starts is broadly consistent with these trends. At a headline level, women comprise 47% of creative apprenticeship starts but two thirds of apprentices enrolled in Social Media and Digital Marketing. In contrast, women are underrepresented on IT apprenticeship frameworks, with men making up three quarters of starts on IT, Software, Web and Telecoms Professional apprenticeships (Figure 4.10).

Figure 4.9: Learning activities at FE institutions (all ages) by Tier 2 SSAs and gender, 2022/23, Wales
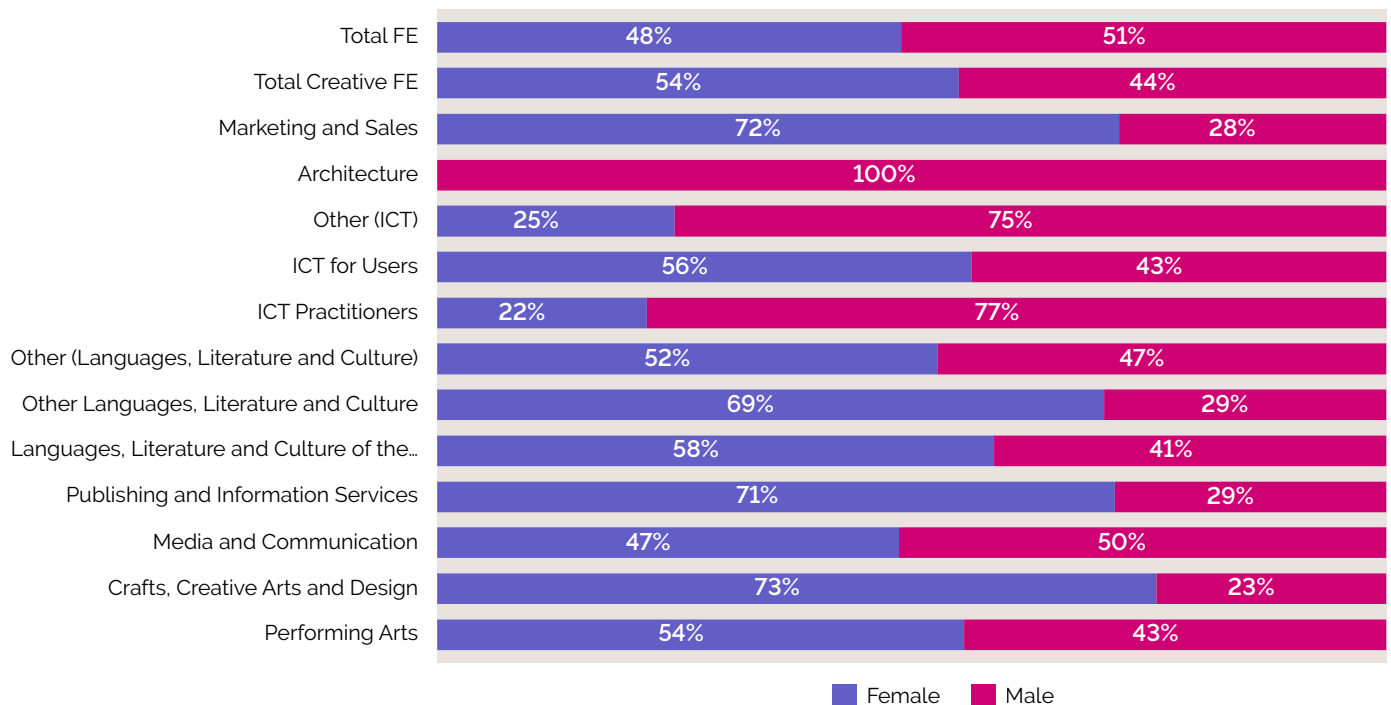
	Female	Male
Total FE	48%	51%
Total Creative FE	54%	44%
Marketing and Sales	72%	28%
Architecture		100%
Other (ICT)	25%	75%
ICT for Users	56%	43%
ICT Practitioners	22%	77%
Other (Languages, Literature and Culture)	52%	47%
Other Languages, Literature and Culture	69%	29%
Languages, Literature and Culture of the…	58%	41%
Publishing and Information Services	71%	29%
Media and Communication	47%	50%
Crafts, Creative Arts and Design	73%	23%
Performing Arts	54%	43%

Source: Authors' elaboration based on data from StatsWales (2024b) and StatsWales (2024d)

Notes: Figures are the number of learning activities at FE institutions in Wales, including WBL provision at FE institutions on a consortium member basis and Local Authority (LA) community learning where there is a formal enrolment at an FE institution. Data for apprenticeship learning programmes includes WBL that is delivered by FE institutions and also WBL delivered by other training providers. Gender is indicated by the learner.

Figure 4.10: Apprenticeships (all ages) by gender, 2022/23, Wales
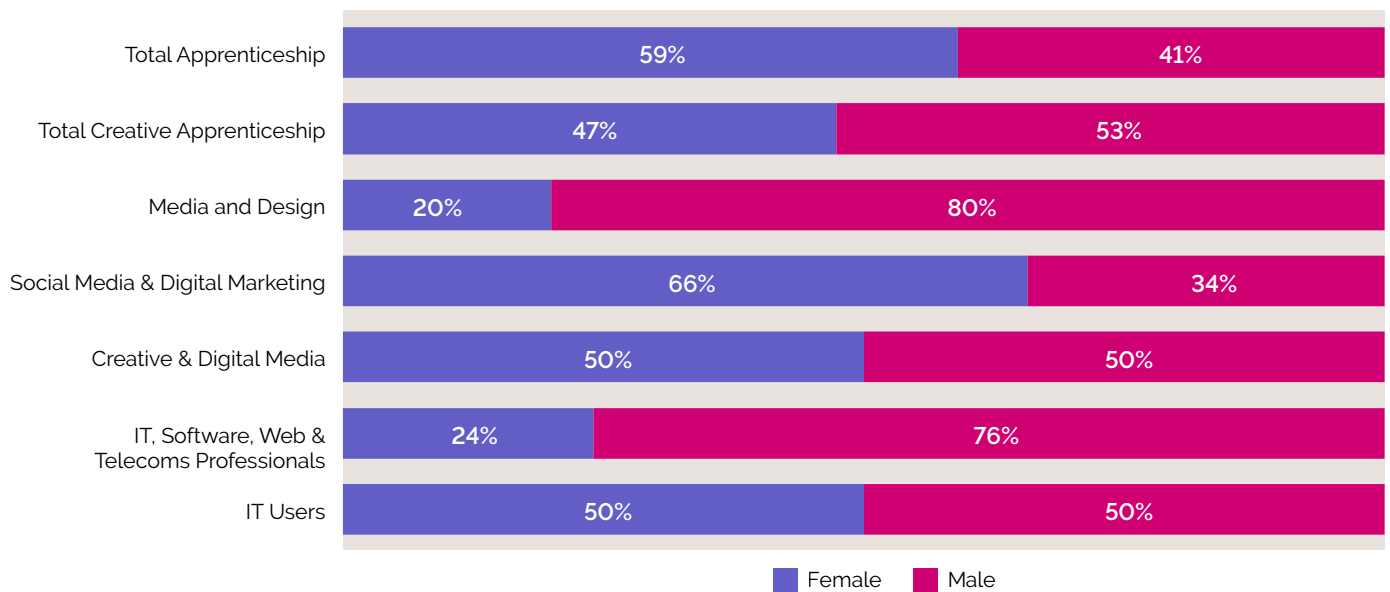
Category	Female	Male
Total Apprenticeship	59%	41%
Total Creative Apprenticeship	47%	53%
Media and Design	20%	80%
Social Media & Digital Marketing	66%	34%
Creative & Digital Media	50%	50%
IT, Software, Web & Telecoms Professionals	24%	76%
IT Users	50%	50%

Source: Authors' elaboration based on data from StatsWales (2024b) and StatsWales (2024d)

Notes: Figures are the number of learning activities at FE institutions in Wales, including WBL provision at FE institutions on a consortium member basis and Local Authority (LA) community learning where there is a formal enrolment at an FE institution. Data for apprenticeship learning programmes includes WBL that is delivered by FE institutions and also WBL delivered by other training providers. Gender is indicated by the learner.

When considering how learning activities vary among young people and adults, we have found that the majority of those pursuing creative FE courses were undertaken by younger learners, aged 24 or under (67%). This is similar to the proportion for all FE learning activities. A slightly lower share of learners in creative FE were aged 25–49 (21% compared to 26% in all FE), and conversely a slightly higher proportion in creative FE were aged 50 and over (12% compared to 7% in all FE). The proportion of younger learners, aged 24 and under, was highest in Performing Arts (88%), Architecture (89%) Media and Communication (89%) and Other Languages, Literature and Culture (87%). In contrast, the proportion of learners aged 50 and over was highest in Other Languages,

Literature and Culture (32%), ICT for Users (28%) and Crafts, Creative Arts and Design (23%). In turn, a greater share of middle-aged learners were found in Publishing and Information Services (73%) and Marketing and Sales (66%) (Figure 4.11).

There was also a degree of variation in the age composition of learners taking apprenticeships. For example, the majority (58%) of creative apprenticeship starts involved learners aged 25–49, which is slightly higher than the proportion for all apprenticeships (51%). In contrast, there was a lower proportion of creative apprenticeship starts for those aged 50 and over (2%) than was the case for all apprenticeships (7%).

Figure 4.11: Learning activities at FE institutions by Tier 2 SSAs and age, 2022/23, Wales

	24 and under	25-49	50 and over
Performing Arts	88%	5%	8%
Crafts, Creative Arts and Design	59%	17%	23%
Media and Communication	89%	5%	5%
Publishing and Information Services	27%	73%	
Languages, Literature and Culture of the British Isles	87%	11%	
Other Languages, Literature and Culture	44%	24%	32%
Other (Languages, Literature and Culture)	72%	23%	5%
ICT Practitioners	66%	31%	
ICT for Users	22%	50%	28%
Other (ICT)	76%	15%	10%
Architecture	89%	11%	
Marketing and Sales	25%	66%	9%
Total Creative FE	67%	21%	12%
Total FE	67%	26%	7%

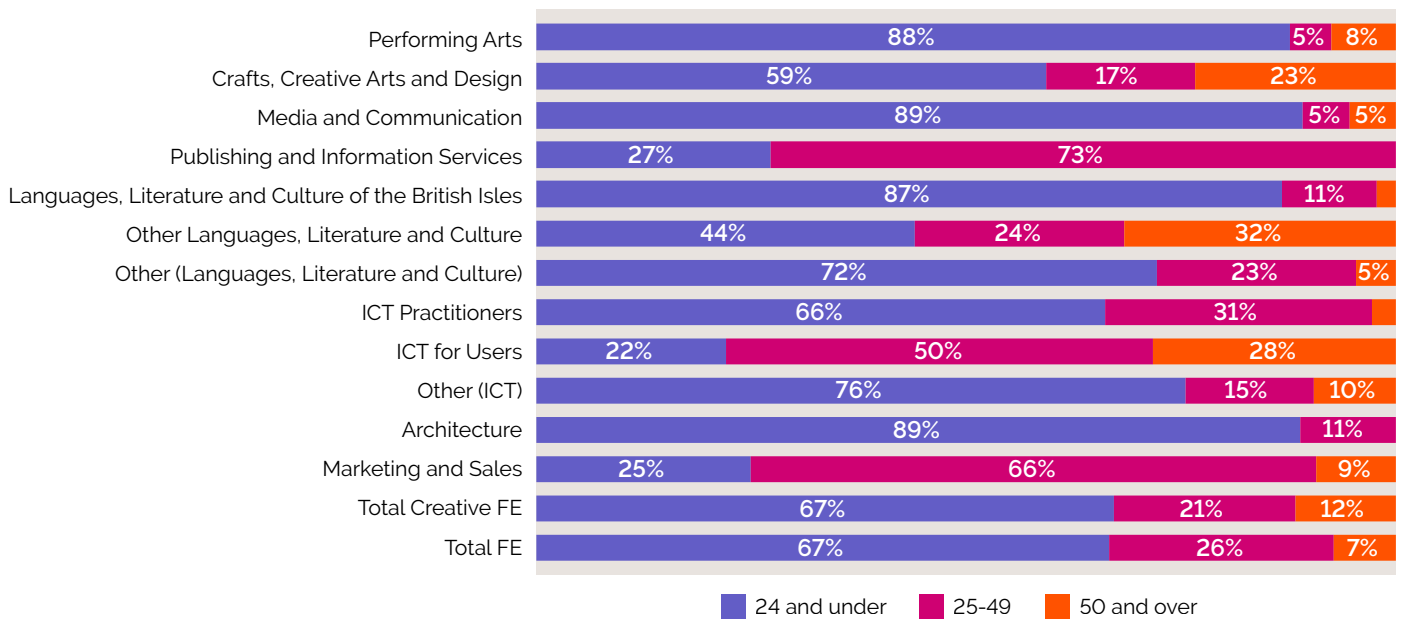**Source: Authors' elaboration based on data from StatsWales (2024b) and StatsWales (2024d)**

Notes: Figures are the number of learning activities at FE institutions in Wales, including WBL provision at FE institutions on a consortium member basis and Local Authority (LA) community learning where there is a formal enrolment at an FE institution. Age of the learner is at 31 August of the academic year.

4.6: Learner outcomes and destinations in Wales

It is also of interest to explore variations in learner outcomes, including rates of achievement and learner destinations. This has involved analysis of available data on achievement for vocational programmes, as measures of performance, such as completion rates and success rates.[38]

In 2021/22, there were 3,420 completions on Arts, Media and Publishing vocational programmes and 1,445 on Information and Communication Technology vocational programmes.[39] The completion rate is defined as the percentage of programmes or activities which are finished, whether or not the qualification was achieved. The analysis has revealed that, at a broad subject level, completion rates were slightly higher for Information and Communication Technology (87%) and Arts, Media and Publishing (88%) than was the case for the FE average (84%) (Figure 4.12).

When achievement of qualifications (that is, so-called success rates) is taken into account, the picture becomes more nuanced. Indeed, while the success rate among those studying Arts, Media and Publishing vocational programmes remained higher than other areas of learning (at 80%), success rates in ICT fell slightly below the average across all subject disciplines (73% and 74%, respectively).

Figure 4.12: Completion and success rates of vocational programmes by SSAs, 2021/22, Wales
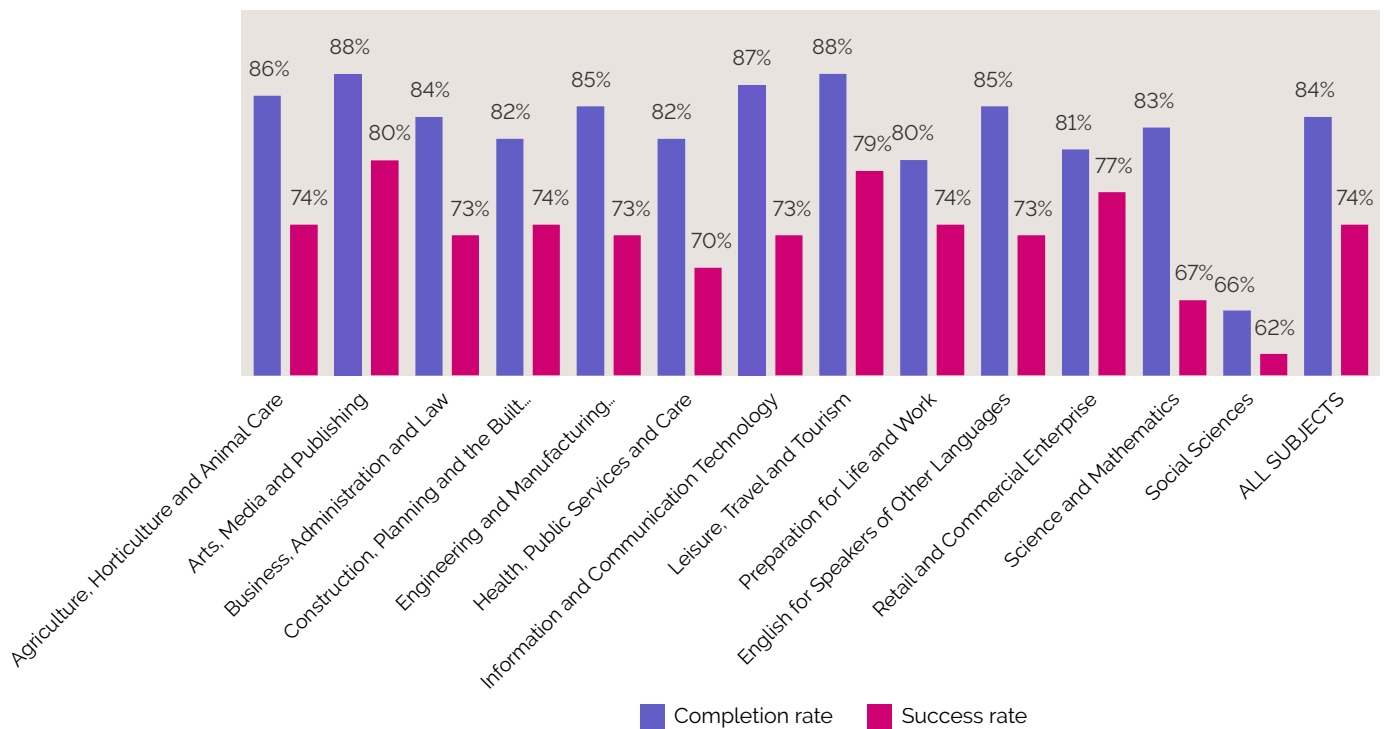
Source: Authors' elaboration based on data from Welsh Government (2023), Table 2_12

Notes: Full-time learners studying programmes with mainly vocational qualifications at FE institutions (35,750 vocational starters in 2021/22) and school sixth forms (200 vocational starters). These qualifications have different lengths, so the vocational measures only look at achievement over one year. Completion rate is defined as the percentage of programmes or activities which are finished, whether or not the qualification was achieved. Success for vocational programmes is measured as the percentage of main qualifications studied that were successful.

It has also been possible to review the achievement rates for apprenticeships taken in Wales and how the rates have varied over time since 2014/15. The relative performance of creative apprentices has been compared to the average for all apprentices (Figure 4.13).[40] This shows that attainment rates for Information and Communication Technology apprenticeships have generally been higher over time compared to Arts, Media and Publishing apprenticeships and relative to the rate for all apprenticeships. That said, in 2021/22 the attainment rate for Information and Communication Technology apprenticeships (73%) and for all apprenticeships (66%) fell compared to previous years – a likely impact of the Covid-19 pandemic.

Figure 4.13: Attainment rate of apprenticeships (all ages) by subject area, 2014/15 to 2021/22, Wales
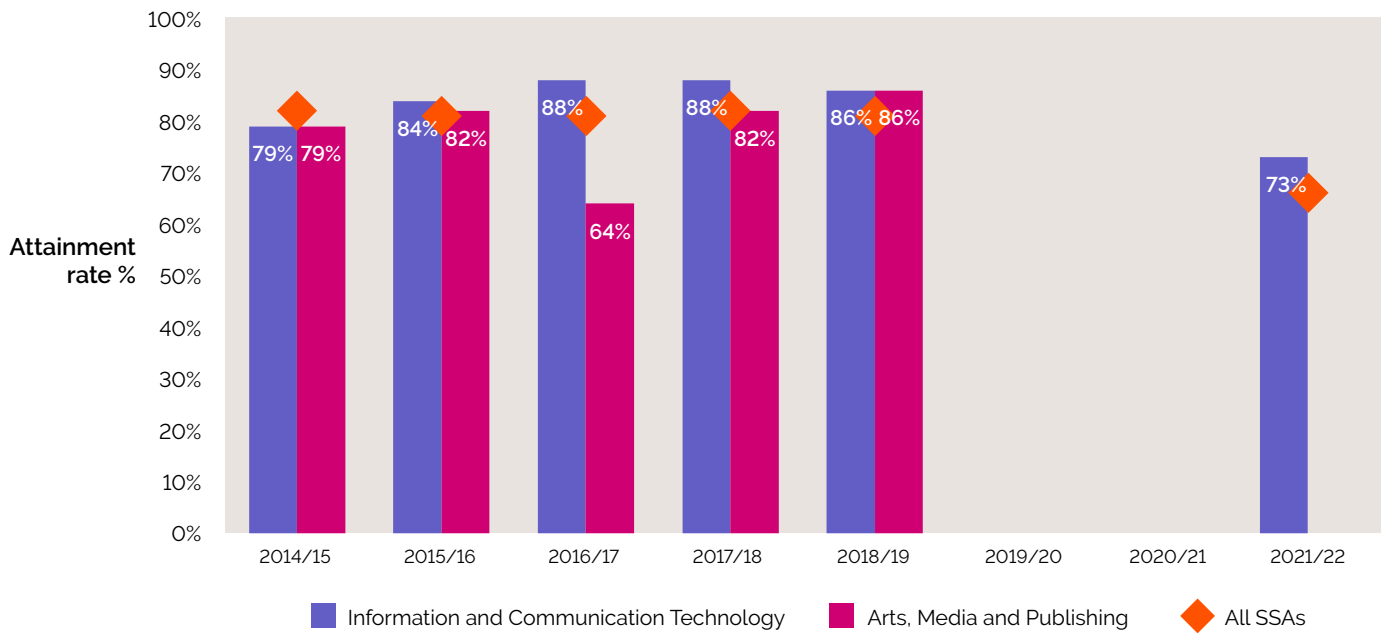
Source: Authors' elaboration based on data from StatsWales (2024e)

Notes: Attainment rates for WBL that is delivered by FE institutions and local authorities. Attainment rates are calculated based on the number of full apprenticeship frameworks that were attained, not a count of learners. Includes FAs, apprenticeships and Higher Apprenticeships.

5 Creative further education in England

5.1: Labour market and policy context in England

Over the past decade, England's creative industries have expanded strongly. Economic output of the creative industries increased from £64.1 billion in 2010 to £97.4 billion in 2020 (an uplift of 52%) (DCMS, 2023).

Jobs growth has followed suit. Between 2011 and 2022, over 750,000 additional employment opportunities were created in creative industries in England – representing employment growth at a rate of more than four times that in the wider economy.

In England, creative skills development opportunities are being influenced by a major skills reform programme which will have a significant impact on further, higher and technical education courses and pathways. Such developments, therefore, have an important bearing on this study. The reforms have the broad goal of widening lifelong learning activities for adults to reskill and upskill, as well as enabling young people to get into work and get on in work. A key focus is around expanding options for technical education, alongside traditional academic routes, with extensions to work-based learning programmes such as apprenticeships and broader college-based courses, including T Levels for 16- to 19-year-olds. Current reforms have their roots in the Wolf Report (Wolf, 2011)[41] and the Sainsbury Review (Sainsbury, 2016),[42] which led to the UK government launching the dedicated Post-16 Skills Plan in 2016 for England (DfE, 2016), initiating the reform programme. In 2021, the long-term trajectory and priorities for the skills system were further endorsed and extended through the UK government's Skills White Paper

(DfE, 2021) and most recently the Levelling up White Paper (DLUHC, 2022).

A central aim behind the reforms is to build a stronger labour market relevant skills system on a par with other leading nations (OECD, 2019), more closely connected to employers and more responsive to the changing employment and skills requirements of the modern economy. Its objectives can, therefore, in principle offer many potential benefits to the creative industries in terms of growing the creative talent pipeline. In particular, the ongoing development of technical education and qualifications delivered by the Institute for Apprenticeships and Technical Education (IFATE) on behalf of the Department for Education (DfE), in partnership with employers, is providing opportunities to maintain relevant and responsive provision for the creative industries.

A core priority of the UK government has been to simplify the system and support better alignment, and hence better individual progression, through education and training pathways – that is, with clearer academic and technical routes. In addition to the establishment of apprenticeships and T Levels, qualification pathways are being reformed with the development of a series of recognised 'progression qualifications'.[43] These aim to operate from qualifications at entry level

and levels 1 and 2 to support progression to higher levels of study (these include T Level foundation qualifications, technical progression qualifications and academic progression qualifications). Qualification reforms are also seeing the development of college-based 'alternative academic qualifications' in strategically important subjects, filling gaps in provision in non-technical pathways not met by A levels and T Levels – for example, for STEM subjects (science, technology, engineering and mathematics). At the same time, many wider qualifications that do not meet new qualification criteria are being replaced and defunded (e.g. applied general qualifications). At the time of writing, these reforms are ongoing, with developments being sequenced through different phases and cycles because of their scale. Many, including those impacting on the creative industries, are yet to be fully implemented.

More generally, steps to broaden access and reach for those who are lower skilled are seen with the introduction of new short, intensive pre-employment training, such as through skills bootcamps (i.e. 16-week training programmes). In addition, these reforms are also preparing the way to introduce a new baccalaureate-style qualification for 16- to 19-year-olds over the next 10 years – the Advanced British Standard. This entails exploring the feasibility of integrating academic and technical options more closely – by combining A levels and T Levels and providing multiple options in one programme (DfE, 2024). There is also further work on strengthening pathways through FE into HE, with the introduction of Higher Technical Qualifications (HTQs) at levels 4 and 5, and the growth of a network of Institutes of Technology across England.[44] This aims to involve further education (FE) colleges as well as universities. The Institutes of Technology aim to formally recognise and fund collaborations between colleges, universities and employers to provide more specialised and responsive routes into and through higher technical education in future and hence boost employment in specialised fields such as the creative industries.

While the progression of the skills reform programme has generally begun to set out various ways in which the skills system will be more responsive to industry, the establishment of a dedicated Sector Vision for the creative industries has been vital for the UK government and industry, operating through the Creative Industries Council, to agree distinct partnership projects for advancing creative skills (DCMS/CIC, 2023). Indeed, the Sector Vision features a 'creative careers promise' that will build a pipeline of talent into the sector, and it makes a range of wider commitments. These include: publishing a new Cultural Education Plan; undertaking skills assessments in creative sub-sectors to better identify creative skills priorities; embedding creative industries in existing careers initiatives; providing a further £1 million in funding for the industry-specific Discover! Creative Careers Programme; supporting developments in qualifications and skills programme reforms seen with the rollout of two new creative T Levels as well as the Digital HTQ and a Creative and Design HTQ (to be taught from 2025).

Of particular relevance to this report, FE is central to future skills reforms and the Sector Vision, delivering academic, technical and professional education and training, with a particular focus on advancing attainment at levels 2 and 3. That said, a range of education and training opportunities are provided for young people and adults to support progression to higher levels of study and/or employment, from entry level to levels 4 and 5. In England, the DfE is responsible for overseeing publicly funded FE and training, supported through the Education and Skills Funding Agency and IFATE. This involves working with a network of around 225 colleges[45] (158 general FE colleges, 44 sixth form colleges, 11 land-based colleges, 2 art, design and performing arts colleges, and 10 specialist designated colleges/institutes of adult learning) (AoC, College Key Facts, 2023) and around 1,700 publicly funded independent training providers (AELP, 2023).[46] In common with other nations, courses offered cover a range of academic (General Certificate of

Secondary Education – GCSE – qualifications, A levels) and technical qualifications (including T Levels and apprenticeships) alongside wider basic skills and community learning. In 2021/22, there were around 1.6 million students registered with colleges alone, 925,000 (58%) of whom were adults (aged 19 plus). Yet, of the total college income in 2021/22 (£6.4 billion), 56% was spent on 16–18 FE (£3.6 billion) (AoC, College Key Facts, 2023). Hence a greater share of funding supports young people.

While the funding and regulation of FE in England is largely managed nationally, through skills agencies such as the Education and Skills Funding Agency (ESFA), there have been steps to introduce greater flexibility sub-nationally with the devolution of the Adult Education Budget to the Combined Authorities and the introduction of Local Skills and Improvements Plans (LSIPs). These aim to identify and respond to distinct regional and local skills priorities. In turn, FE providers have a statutory duty to respond to these priorities. With the production of LSIPs led by employer representative bodies designated by the DfE (usually in the form of regional Chambers of Commerce), this provides

a further mechanism in principle to shape provision more effectively to employer needs. That said, these steps to towards devolution are still quite modest and the regulation and funding of the skills system remains quite centralised.

While the sector has been exposed to much turbulence and policy change and churn over recent decades,[47] there are some enduring strategic objectives and features driving what FE is aiming to achieve in the English system. Core goals have been to work to support the education of local communities so that individuals can progress and to respond to changing employer demands, which means embracing and advancing social inclusion as well as economic development. That said, there have been differences in how this should be realised, evident not least in ongoing changes to the institutional landscape and what skills and education programmes are funded and delivered. The current reform programme clearly must be set in that context. Ongoing change is a significant feature not only of the English skills system generally, but the FE sector specifically.

5.2: Participation in creative FE in England

FE data in England is published on a quarterly basis, meaning that provisional in-year data is available for 2023/24 but the latest full year of data on enrolments and achievements relates to the 2022/23 academic year (covering August 2022 to July 2023).

The data includes: apprenticeships; community learning; education and training (19+) provision taken at general FE colleges (including tertiary), sixth form colleges, special colleges (agricultural and horticultural colleges, and art and design colleges); and specialist colleges and external institutions.[48] A separate data release covers apprenticeship and traineeship data in more detail, but apprenticeships and traineeships are included in the overall FE numbers unless otherwise specified. Data is derived from the Individualised Learner Record (ILR), which is an administrative data collection system designed primarily for operational use in order to fund training providers for learners in FE and on apprenticeship programmes. It is important to note that the DfE FE and skills statistical releases do not contain information regarding provision for 16- to 18-year-olds except for apprenticeships, traineeships and in some cases community learning, regardless of educational institution.[49] These releases also do not include higher education (HE) – for example, degrees – in HE institutions, but will include FE learning performed at HE institutions, degrees performed in FE institutions and degrees undertaken as part of an apprenticeship programme. Additionally, the FE and skills releases do not include privately funded training.

Some data is available at sector subject area (SSA) Tier 2, but the majority of data published is available at SSA Tier 1. It is not possible to directly map SSA Tier 1 to creative industries. As such, three of the largest likely categories for creative FE are used as a proxy – Arts, Media and Publishing; Languages, Literature and Culture; and Information and Communication Technology. As some data is also available by SSA Tier 2, data for creative FE would also include figures for: Architecture (in the Construction, Planning and Built Environment group) and Marketing and Sales (in the Business, Administration and Law group). These have been included where possible.

Data for 2020/21 for apprenticeships based with employers in the creative industries was published at the request of the Department for Digital, Culture, Media and Sport (DCMS). We could not find a specific methodological note on how the creative industries were defined, other than it included data for the creative sector, where a match has been made between the ILR and the Office for National Statistics (ONS) Inter-Departmental Business Register (IDBR). This presumably means that it includes apprenticeships at businesses classified with Standard Industrial Classification (SIC) codes in the DCMS sector definition.[50] Data is also available for 2022/23 for apprenticeships by SSAs (mainly Tier 1 but some Tier 2).[51]

In 2022/23, there were just under 170,000 creative aim enrolments in college-based FE and training (learners aged 19+). Around half of these enrolments were on Information and Communication Technology courses (83,040). A further 48,390 aim enrolments were on Arts, Media and Publishing courses (29%), and 32,520 were on Languages, Literature and Culture courses (19%) (see Figure 5.1). In addition, there were 5,610 enrolments on Marketing and Sales courses (3%) and just 30 on Architecture courses (less than 1%).

Figure 5.1: College-based FE enrolments (education and training, aged 19+) by Tier 1 SSAs, 2022/23, England
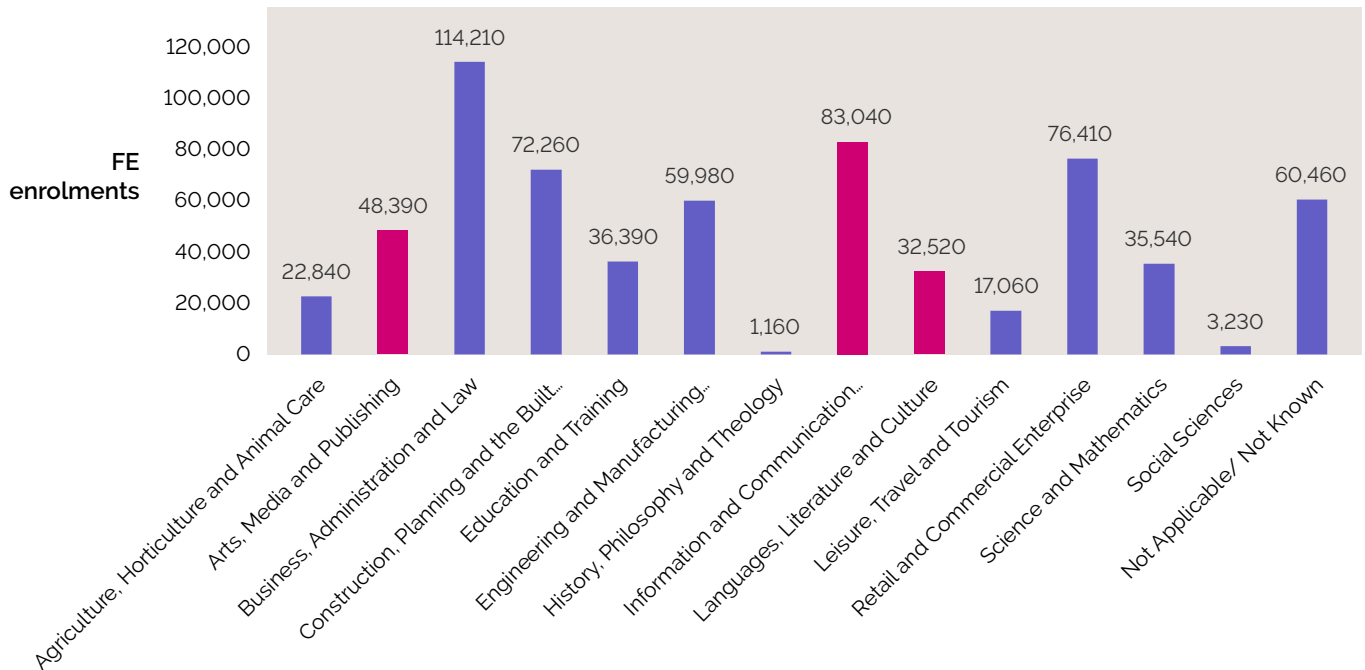
Source: Authors' elaboration based on data from DfE (2023a), e-and-t-subject-202223-q4
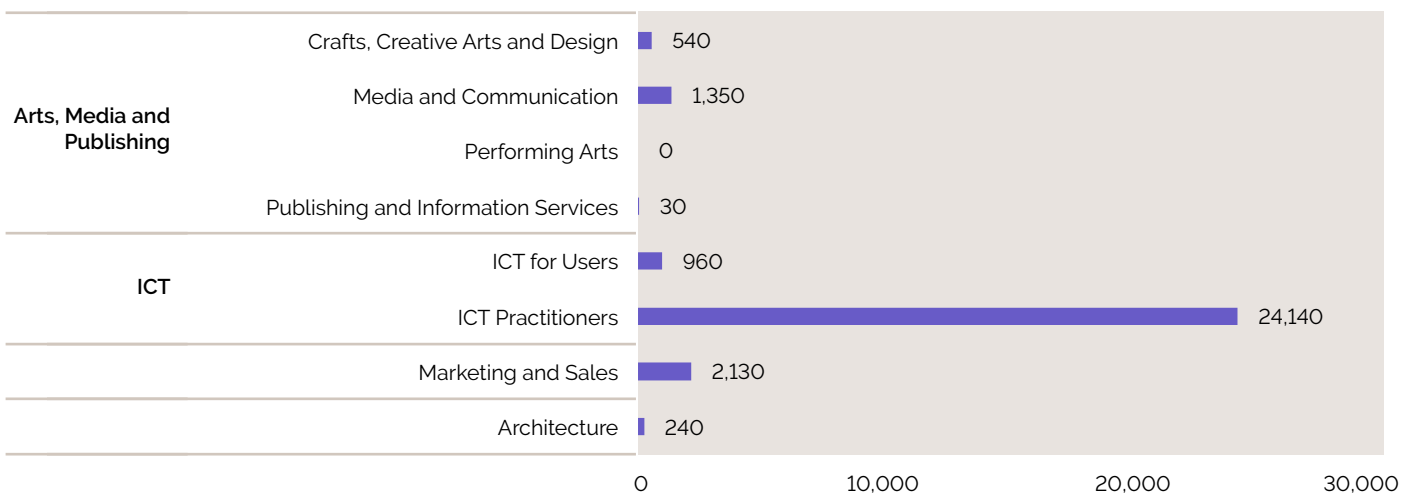
Notes: Data is college-based creative FE enrolments on education and training (aged 19+), as defined by the DfE. Data includes FE institutions but excludes FE provision through school sixth forms, HE institutions and private providers. Aim enrolments are a count of enrolments at aim level (including component aims) for each stated academic period. Learners will be counted for each aim they are studying and so can be counted more than once. The figure excludes Preparation for Life and Work (867,850) and Health, Public Services and Care (296,070) for formatting purposes. Creative disciplines are highlighted in pink.

A closer examination of the make-up of these broad creative subject areas shows that the Arts, Media and Publishing learning activities consisted of: 20% Performing Arts; 69% Crafts, Creative Arts and Design; and 11% Media and Communications. The majority of Languages, Literature and Culture activities were in Languages, Literature and Culture of the British Isles (75%). Information and Communication Technology was split between ICT Practitioners (43%) and ICT for Users (57%).

An examination of the take-up of apprenticeships[52] in England also provides an opportunity to explore those pathways which combine practical training within a job to secure industry-recognised qualifications and to develop technical skills. Apprenticeships in England exist at different levels:

- **Intermediate Apprenticeships**: operating at Level 2, these provide basic knowledge and skills for specific jobs and are equivalent to GCSEs;

- **Advanced Apprenticeships**: operating at Level 3, these offer more specialised knowledge and skills and are equivalent to A levels;

- **Higher Apprenticeships**: available from Level 4 to Level 7, these focus on higher-level professional skills and are equivalent to foundation degrees, Higher National Certificates or Higher National Diplomas;

- **Degree Apprenticeships**: these apprenticeships at levels 6 and 7 are equivalent to bachelor's or master's degrees.

Figure 5.2: Creative Tier 2 SSA apprenticeship starts (aged 16+), 2022/23, England

Arts, Media and Publishing	Crafts, Creative Arts and Design	540
	Media and Communication	1,350
	Performing Arts	0
	Publishing and Information Services	30
ICT	ICT for Users	960
	ICT Practitioners	24,140
	Marketing and Sales	2,130
	Architecture	240

Source: Department for Education (2023b), app-subject-summary-202223-q4

Notes: Apprenticeship starts is the count of apprenticeship programmes that begin in an academic year, showing the take-up of programmes.

While apprenticeships in England share many common features with those in other parts of the UK, the English programme has become quite distinct, as the UK government since 2017 has driven significant changes in the design and delivery to stimulate greater demand and take-up. These differences also have to be borne in mind when considering creative participation and attainment levels. In England, following the Richards Review of Apprenticeships in 2012 (DfE, 2012), there has been a move away from apprenticeship frameworks, which had a primary focus on qualification attainment, towards apprenticeship standards. This has placed a greater emphasis on skills, knowledge and behaviours required in specific occupations. The retention of apprenticeship frameworks in the other UK nations develops curricula based on National Occupational Standards. These are developed systematically with the involvement of recognised sector bodies to help identify industry needs. In contrast, the apprenticeship standards in England are overseen by IFATE, working with employer groups that are specifically created (and then disbanded). There has been no systematic evaluation of the impact of variations in the design process (Lusher, 2023).

There are also differences in the funding of apprenticeships, which may have additional effects on take-up. In England, apprenticeships are largely funded through the Apprenticeship Levy. Steps are taken to ensure some kind of link to demand, with the majority of the revenue collected being used to subsidise the cost to employers of providing apprenticeships.[53] Other UK nations in principle receive a notional amount in their UK funding via the Barnett formula, but in practice there is not a concrete link between Levy funds and apprenticeship funding. Subsidy rates for employers are also lower in other nations.

While the UK government has taken various steps to encourage the take-up of apprenticeships over the last decade in England, there remain low levels of participation, overall and in the creative subjects. Indeed, in 2022/23, while there were 337,140 apprenticeship starts (all ages, 16 and over) in total,[54] this was significantly below historical peaks (see further discussion below); in creative areas, apprenticeship starts were also modest, with 29,390 in 2022/23 (9% of all starts).

The vast majority of creative apprenticeship starts were for ICT Practitioners (24,140, 82%), with the next largest subjects being Marketing and Sales (2,130, 7%) and Media and Communications (1,350, 5%) (see Figure 5.2). Apprenticeship starts in Crafts, Creative Arts and Design were very limited: just 540 starts in 2022/23, equivalent to 2% of all creative apprenticeships and 0.2% of all apprenticeships in England. There were no apprenticeships in Languages, Literature and Culture. These patterns will be affected, to some degree, by the phased implementation of the new apprenticeships, with digital apprenticeships among the first developed and wider creative apprenticeships to be developed and implemented during later phases.

Data is also available for apprenticeships based with employers in the creative industries, and this helps build an understanding of the composition of what is on offer in the sector. This reveals that there was a total of 6,730 apprenticeships hosted in the creative industries in 2020/21. Again, in line with the distribution of apprenticeship starts, just over half (53%) of these involved employers from digital areas – that is, IT, Software and Computer Services (Figure 5.3). The next largest category of employers of apprentices in the creative industries was Advertising and Marketing (17%). Outside of these creative sectors, the number of apprentices falls further still, with just 640 apprenticeship starts in the Screen Industries and 700 in Publishing. Across all creative sectors, the vast majority of apprentices were enrolled on courses in ICT or business, rather than other creative disciplines, such as Arts, Media and Publishing (Figure 5.4).

Figure 5.3: Apprenticeship starts (all ages, 16+) at employers in the creative industries, 2020/21, England
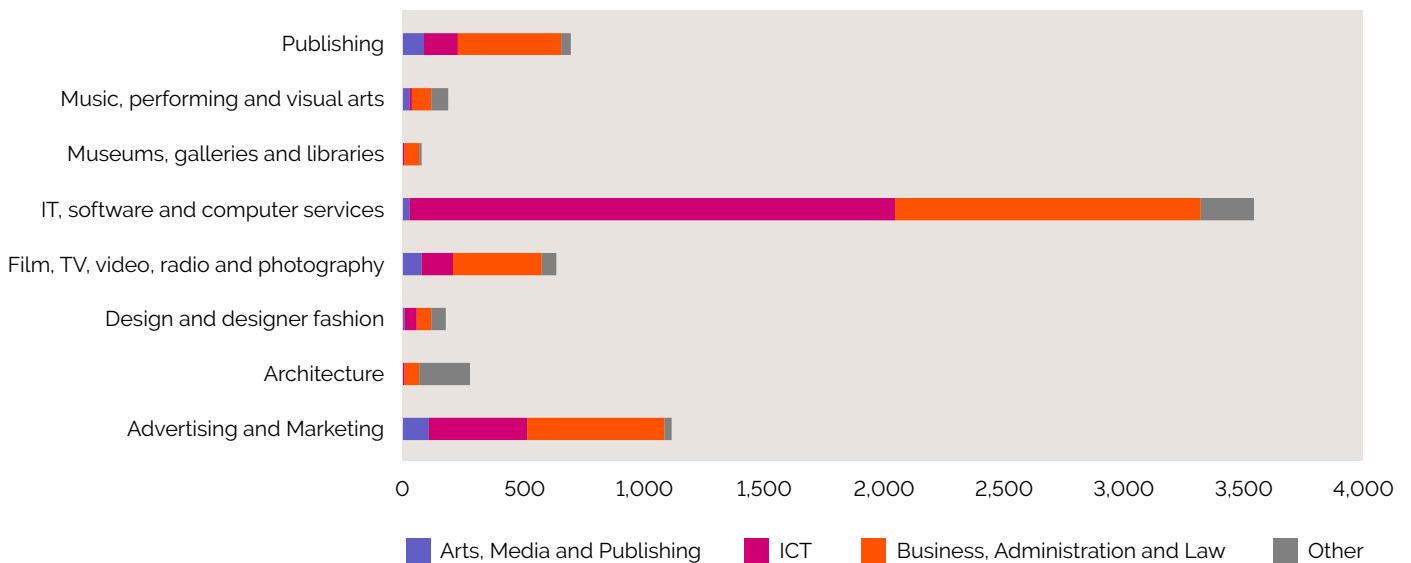
Source: Authors' elaboration based on data from DfE (2022a), amendment_learner_creative

Notes: Industry characteristics of apprenticeship starts in England in the creative sector, where a match has been made between the ILR and the ONS IDBR. Apprenticeship starts is the count of apprenticeship programmes that begin in an academic year – that is, the take-up of programmes.
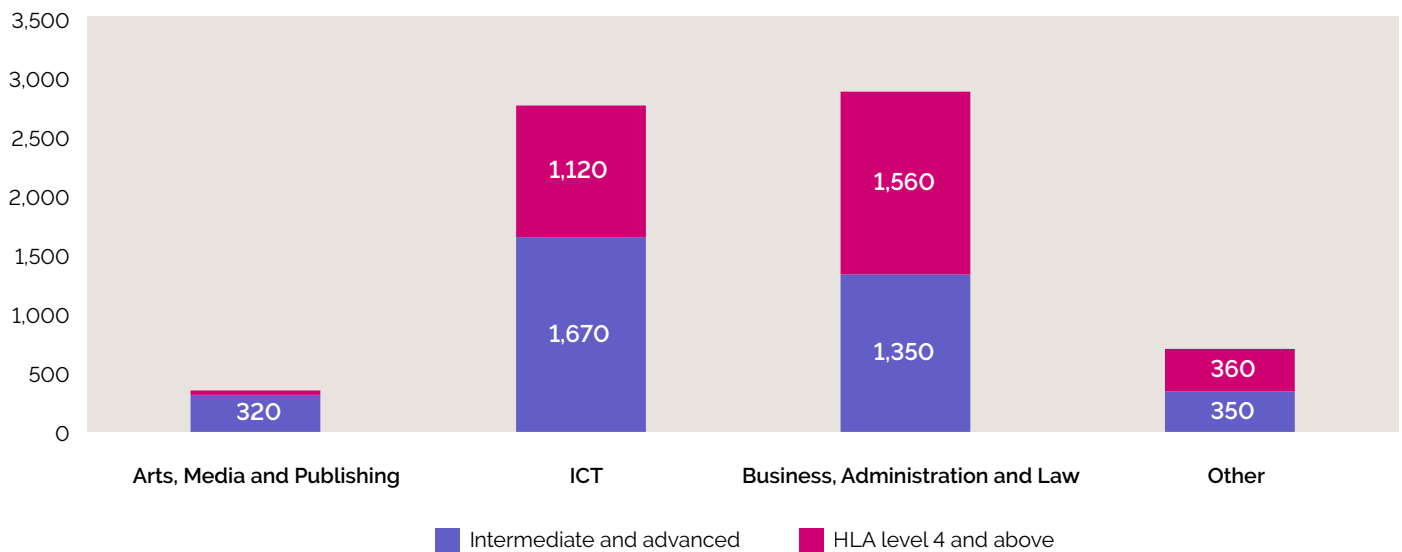
Figure 5.4: Level and SSA of apprenticeship starts (all ages, 16+) at employers in the creative industries, 2020/21, England

Source: Authors' elaboration based on data from DfE (2023b), app-subject-summary-202223-q4

Notes: Apprenticeship starts is the count of apprenticeship programmes that begin in an academic year, showing the take-up of programmes.

5.3: Trends over time in creative FE in England

Despite attempts by the UK government to support greater lifelong learning and to increase the opportunities for adults and young people to progress through FE, HE and technical education, this has not been reflected in participation levels.

Over the past decade, there has been an overall decline in enrolments in FE and particularly so in disciplines relevant to the creative industries. Across all SSAs, college-based FE enrolments (education and training, aged 19+) declined by just under a third (31%) between 2014/15 and 2022/23. However, enrolments have fallen by a much greater degree in creative subject areas – more than halving over this period, from 391,240 in 2014/15 to 169,590 in 2022/23 (a reduction of 57%) (Figure 5.5). This also means the share of FE enrolments that are in creative disciplines has fallen (from 15% in 2014/15 to 9% in 2022/23).

These trends bring with them growing concerns about meeting future skills needs and tackling increasing skills shortages e.g. (DfE, 2023). To some extent, there were consistent reductions in enrolments for FE overall between 2014/15 and 2020/21, mirroring falls in funding, and enrolments have improved with steps to raise public funding recently (such as the 2020/21 spending review) (IFS, 2023). The period from 2016 may also reflect further policy changes following the establishment of the post-16 Skills Plan and wider skills reforms such as moves to new qualifications like T Levels. Yet, these developments can only be a partial explanation. Indeed, while creative enrolments

saw a sharp decline between 2014/15 and 2016/17, the numbers somewhat stabilised until 2020/21, when there was a small increase from the previous years. A closer examination of trends by different subject areas is of value in understanding these developments.

This shows that reductions in enrolments were evident across several creative disciplines.

In particular, the pace of decline was most pronounced in Publishing and Information Services (-96%, albeit from a low base) and ICT for Users (-74%). That said, other creative subject areas witnessed significant growth in the number of enrolments over the period, particularly evident among ICT Practitioners (+252%), with increases also evident in Marketing and Sales (+349%); and Linguistics (+43%) (Figure 5.6).

Figure 5.5: College-based creative FE enrolments (education and training, aged 19+), 2014/15 to 2022/23, England
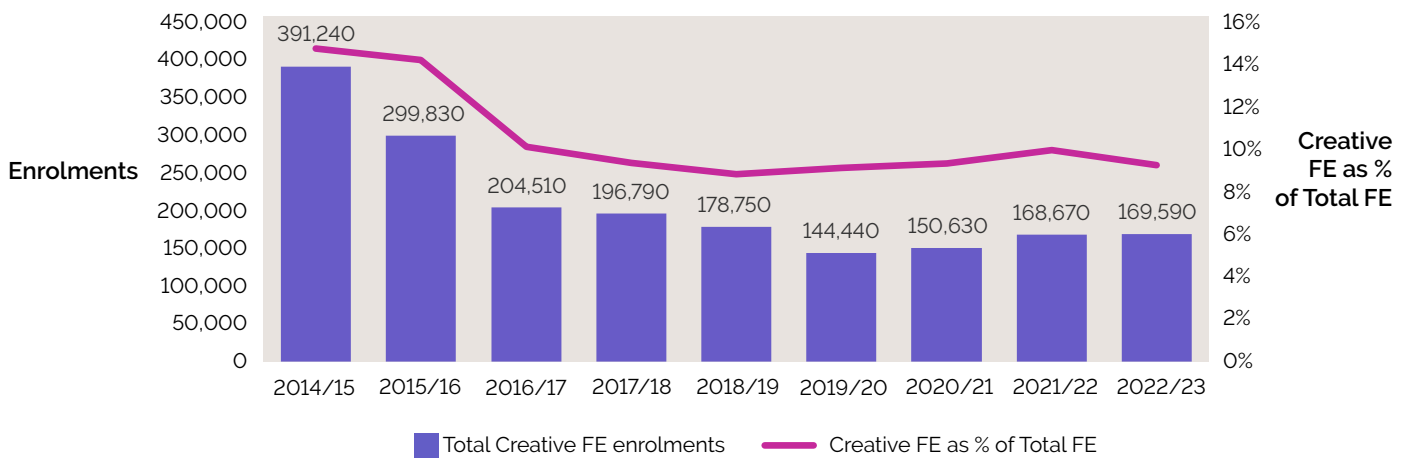
Figure 5.6: Percentage change in college-based creative FE enrolments (education and training, aged 19+) by Tier 2 SSAs, 2014/15 to 2022/23, England
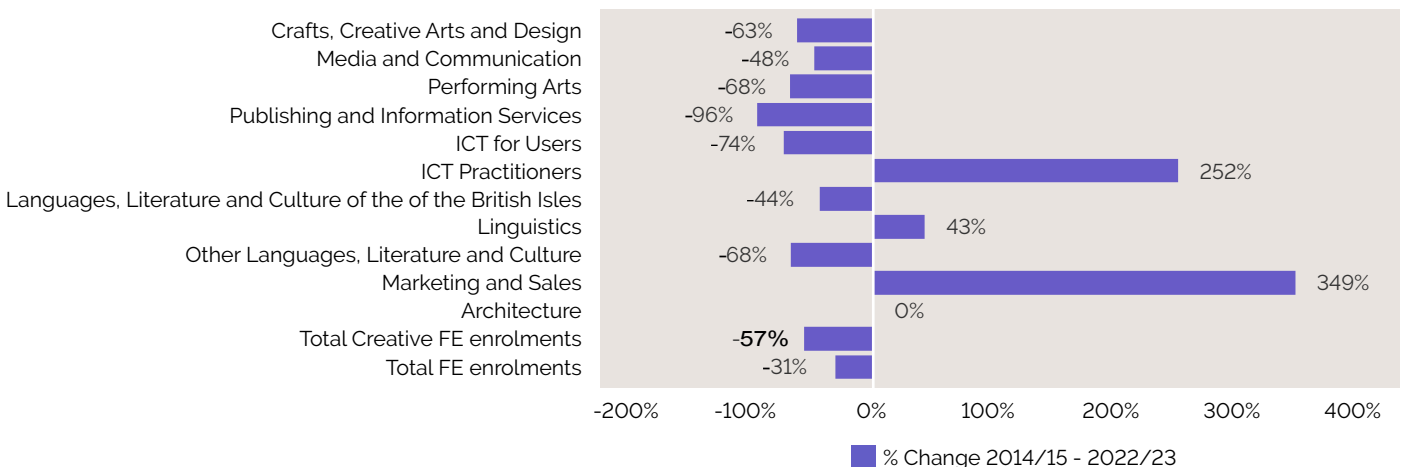
Source: Authors' elaboration based on data from DfE (2023a), e-and-t-subject-202223-q4 and DfE (2020a), e-and-t-subject-t2-1920-q4

Notes: Data is for college-based creative FE enrolments on education and training (aged 19+), as defined by the DfE. Aim enrolments are a count of enrolments at aim level (including component aims) for each stated academic period. Learners will be counted for each aim they are studying and so can be counted more than once.

It is also of interest to examine trends in the take-up of apprenticeships and how this aligns with broader patterns of FE participation and associated policy developments.[55] The data for apprenticeship starts (all ages, 16 and over) shows that, as there have been changes in the design of the apprenticeship programme and moves away from apprenticeship frameworks to standards, there have been changes in the balance of subjects. For example, in 2014/15, apprenticeships for IT Practitioners made up just over half (53%) of creative apprenticeship starts, but by 2022/23 this had increased to 82%. This accompanied considerable falls in the numbers of apprenticeship starts in all other creative subjects except Media and Communication (Figure 5.7).

Further, while the total number of Creative Apprenticeship starts had increased by 29% from 22,730 in 2014/15 to 29,390 in 2022/23, this was driven almost entirely by the growth in IT Practitioner apprenticeships. As a result, the deployment of apprenticeships more generally in creative subjects has declined during this time, suggesting the current programme has a more limited application. These broader patterns of decline mirror wider apprenticeship trends. Indeed, between 2014/15 and 2016/17 overall apprenticeship numbers were around 500,000 starts annually, but, when the new programme was introduced in 2017, overall numbers fell (from 2014/15 to 2022/23, there was a 33% decline overall). Consequently, the share of creative apprenticeships as a percentage of the total in England has increased to 9% in 2022/23 (Figure 5.8).

Figure 5.7: Creative apprenticeship (all ages, 16+) starts by SSAs, 2014/15 to 2022/23, England
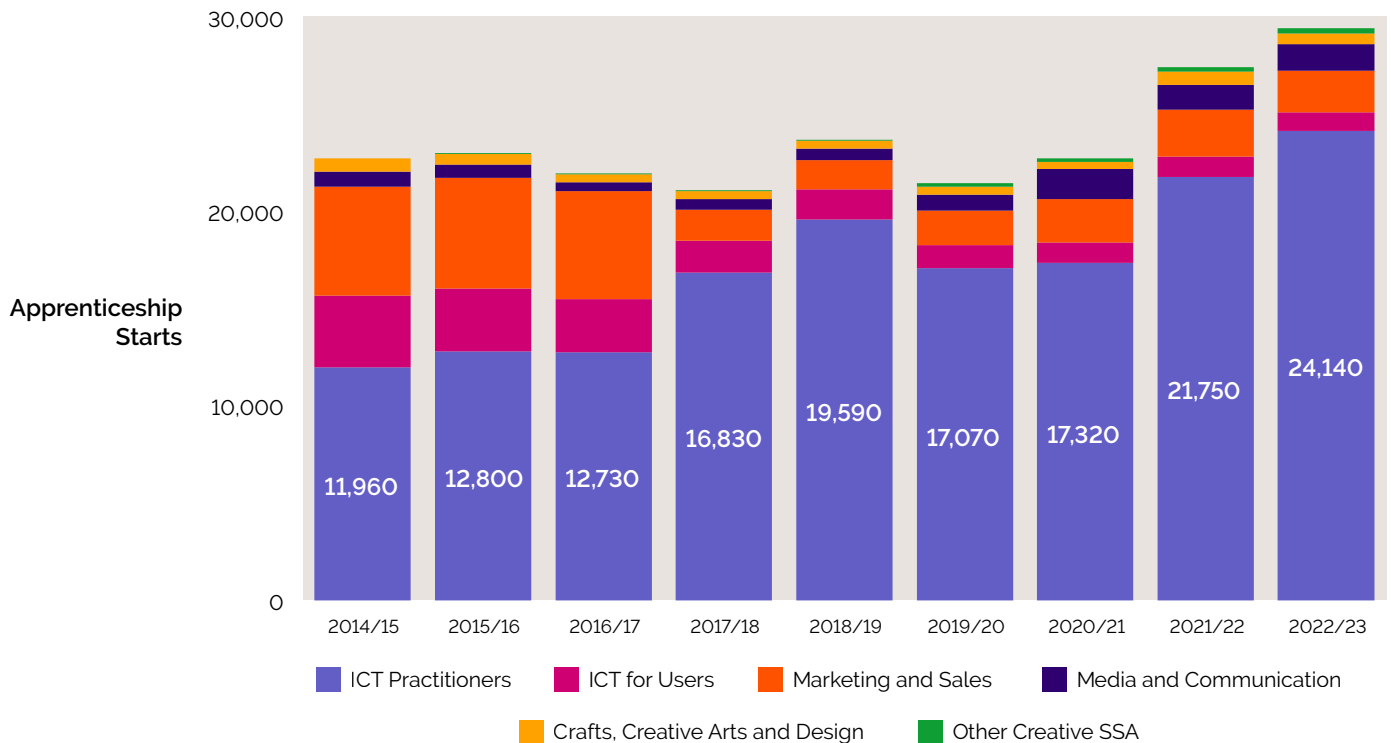
Source: Authors' elaboration based on data from DfE (2023b), app-subject-summary-202223-q4 and DfE (2020b), app-subject-detailed-1920-q4-20

Notes: Industry characteristics of apprenticeship starts in England in the creative sector, where a match has been made between the ILR and the ONS IDBR.

Figure 5.8: Creative apprenticeship starts (all ages, 16+), 2014/15 and 2022/23, England
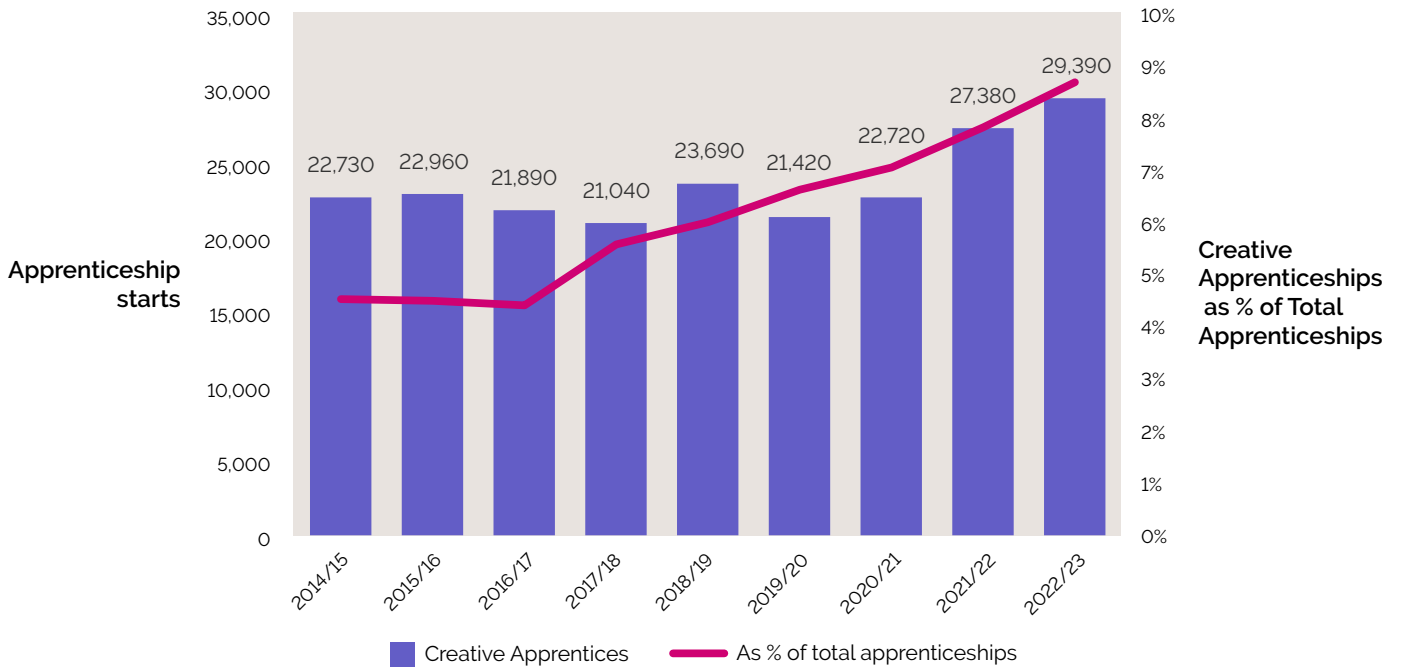
Source: Authors' elaboration based on data from DfE (2023b), app-subject-summary-202223-q4 and DfE (2020b), app-subject-detailed-1920-q4-20

Notes: Industry characteristics of apprenticeship starts in England in the creative sector, where a match has been made between the ILR and the ONS IDBR.

5.4: Spatial patterns of creative FE in England

The report explores spatial patterns of creative FE within England to understand variations in major providers and take-up of creative disciplines in different parts of the country.[56]

When looking at variations in the levels of creative enrolments, London accounted for the largest number of enrolments in 2022/23: 48,380, or 30% of all creative enrolments in England in 2022/23. This was followed by the West Midlands, although this was some distance behind, at 23,290. The North East had the lowest enrolments (7,390) (Figure

5.9). London and the West Midlands also showed the highest specialisation in creative disciplines, which accounted for around 11% of all enrolments in these regions. In contrast, the region with the lowest share of total enrolments being in creative disciplines was the North East (5.9%).

Figure 5.9: College-based creative FE enrolments (education and training, aged 19+) by region, 2022/23, England
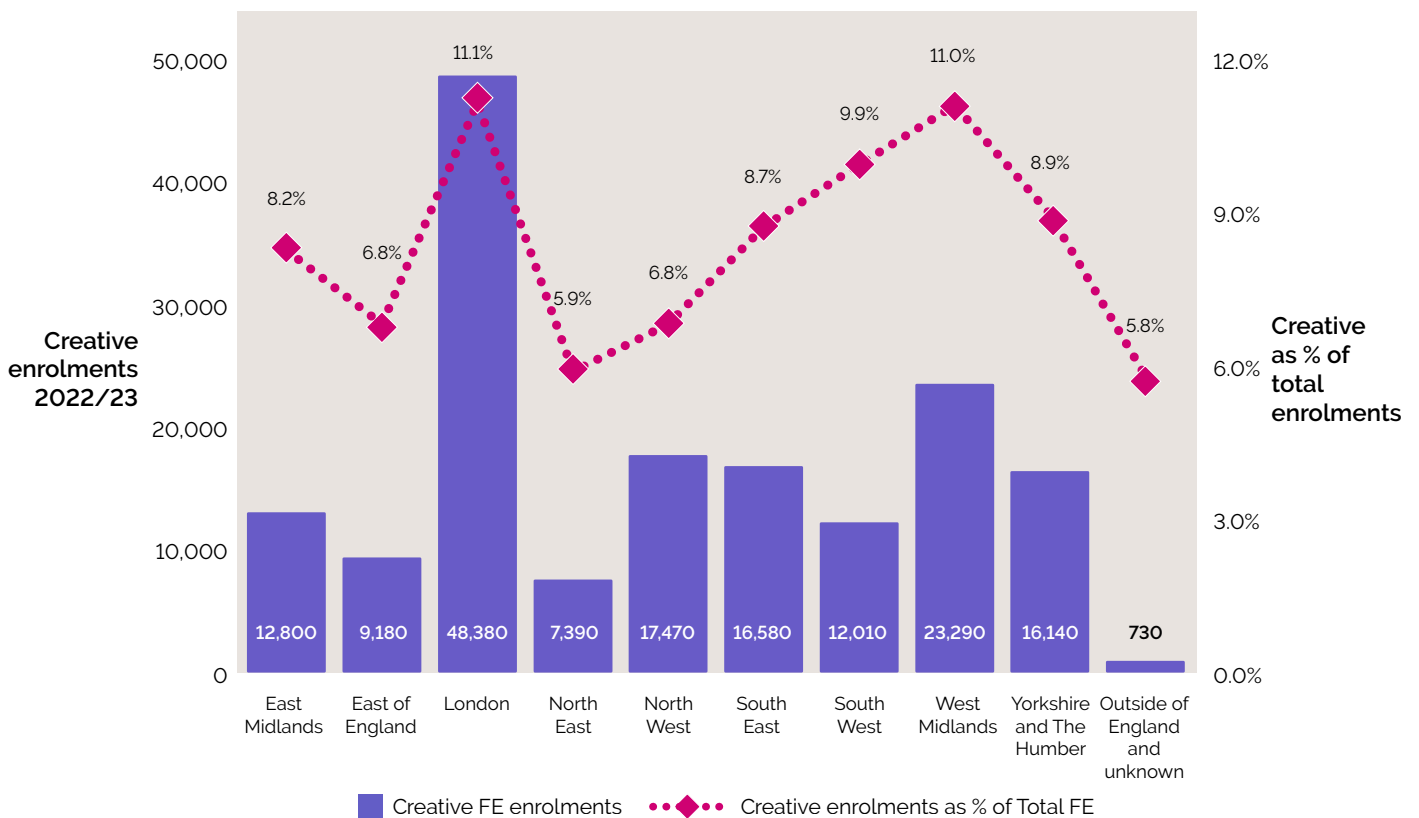
Source: Authors' elaboration based data from DfE (2023a), e-and-t-geography-detailed-2022

Notes: Data is for college-based creative FE enrolments on education and training (aged 19+), as defined by the DfE. Aim enrolments are a count of enrolments at aim level (including component aims) for each stated academic period. Learners will be counted for each aim they are studying and so can be counted more than once. Geography is based on the home postcode of the learner.

A closer examination of the take-up of different creative subjects points to significant variation between English regions. For instance, Information and Communication Technology accounted for 73% of creative FE in the West Midlands compared to just 32% in the South West (where half of enrolments were in Arts, Media and Publishing) (Figure 5.10).

A review of the location of apprentices according to the base of their creative employer shows that a third (34%) of all creative industry apprenticeships in 2020/21 were located in London (Figure 5.11).

Together with the South East (16%) and the North West (13%), they accounted for over half of all creative industry apprenticeships in England. Regional differences are also apparent in creative sub-sectors, with the three aforementioned regions accounting for 83% of Film, TV, Video, Radio and Photography apprenticeships, 73% of Advertising and Marketing apprenticeships and 68% of Publishing Apprenticeships, no doubt reflecting the spatial concentration of these industries in these regions (Siepel, Ramirez-Guerra, & Rathi, 2023; Tether, 2019).

Figure 5.10: College-based creative FE enrolments (education and training, aged 19+) by region and Tier 1 SSAs, 2022/23, England

Source: Authors' elaboration based on data from DfE (2023a), e-and-t-geography-detailed-2022, and DfE (2022b), amendment_region_creative

Notes: Data is for college-based creative FE enrolments on education and training (aged 19+), as defined by the DfE. Aim enrolments are a count of enrolments at aim level (including component aims) for each stated academic period. Learners are counted for each aim they are studying and so can be counted more than once. Geography is based on the home postcode of the learner. Industry characteristics of apprenticeship starts in England in the creative sector, where a match has been made between the ILR and the ONS IDBR. Apprenticeship starts is the count of apprenticeship programmes that begin in an academic year – that is, the take-up of programmes.

Figure 5.11: Apprenticeship starts (all ages, 16+) at employers in the creative industries by region, 2020/21, England
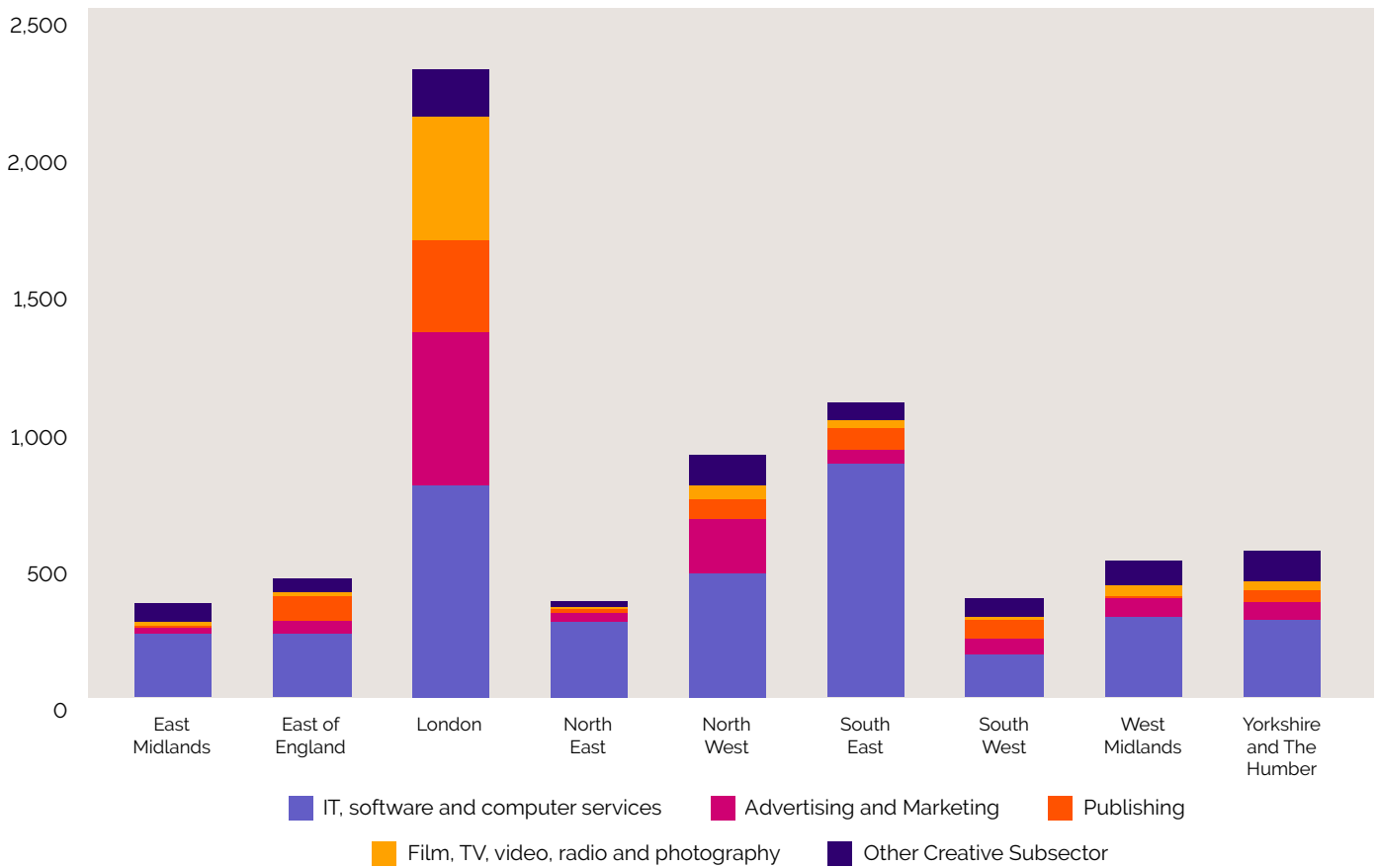
Legend:
- IT, software and computer services
- Advertising and Marketing
- Publishing
- Film, TV, video, radio and photography
- Other Creative Subsector

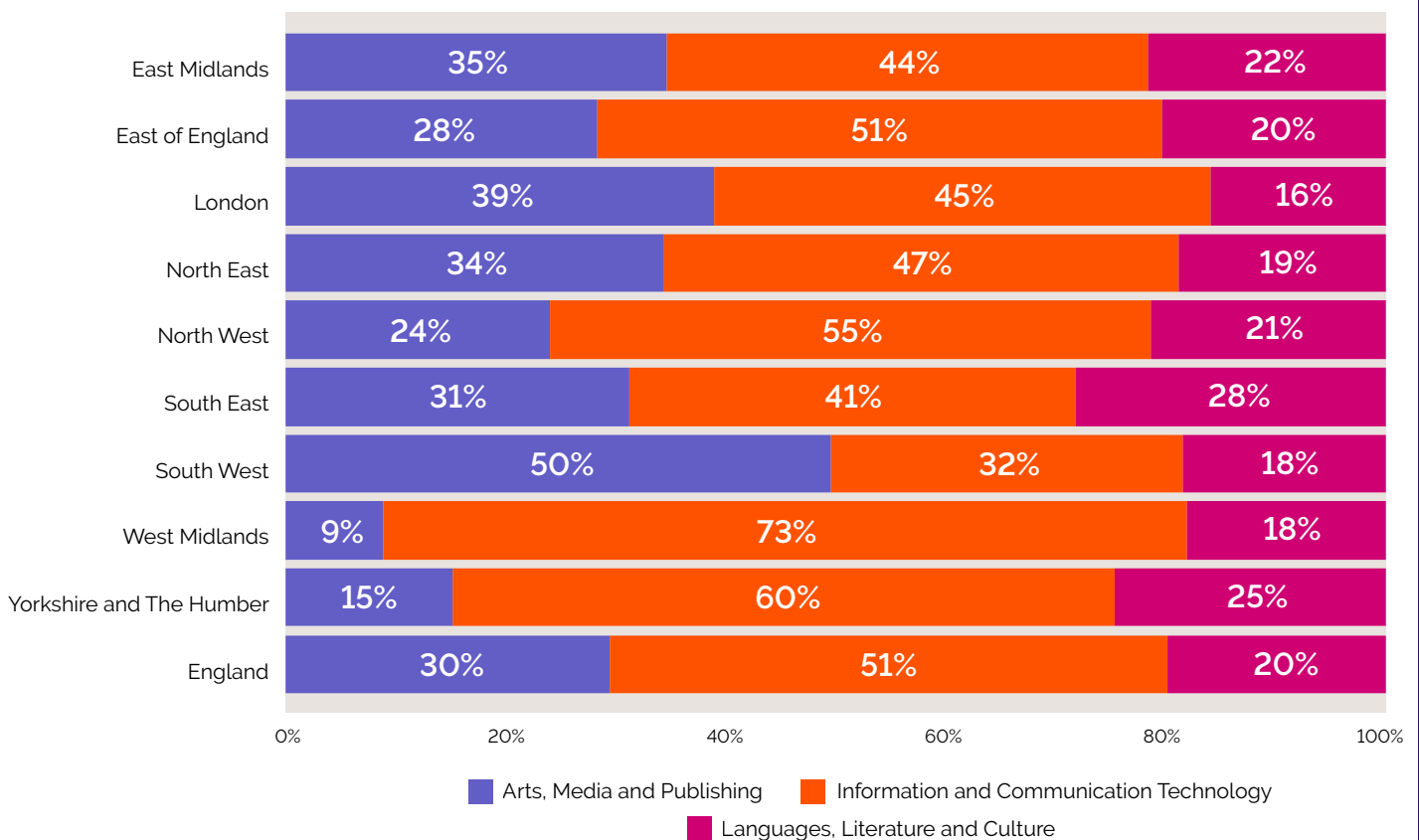Source: Authors' elaboration based data from DfE (2023a), e-and-t-geography-detailed-2022

Notes: Data is for college-based creative FE enrolments on education and training (aged 19+), as defined by the DfE. Aim enrolments are a count of enrolments at aim level (including component aims) for each stated academic period. Learners will be counted for each aim they are studying and so can be counted more than once. Geography is based on the home postcode of the learner.

5.5: Profile of learners in creative FE in England

This research has examined the sociodemographic profile of learners studying creative disciplines in FE in England to understand whether learning opportunities are sufficiently diverse in England.

This is important in a context where the creative sector has been seeking to ensure it makes full use of the diversity of talent in the population. Given data limitations, we can only undertake analysis of leavers from college-based FE (education and training, aged 19+)

at the Tier 1 SSA level (see Figure 5.12). This found significant differences, both between creative disciplines and other areas of learning and between creative subjects themselves. For example:

- As for all subject disciplines, the majority of FE leavers from Arts, Media and Publishing courses were female (62%). Women comprised 70% of those leaving Arts, Media and Publishing courses, but were underrepresented among leavers from Information and Communication Technology courses (57%%) relative to the average across all subjects (61%).

- The ethnicity of FE leavers also varied considerably between creative SSAs. The majority of FE leavers from Arts, Media and Publishing courses were white (75%), while less than half of leavers from Information and Communication Technology courses (45%) were white. The proportion of Asian (22%) and black (18%) leavers from Information and Communication Technology courses was notably higher than the overall FE average (16% and 13%, respectively).

- Creative courses had a higher share of leavers with learning difficulties or disabilities (LLDD) compared to the FE sector as a

whole, but with variation across subject areas. Arts, Media and Publishing courses and Languages, Literature and Culture courses had a higher share of FE leavers with learning difficulties or disabilities (33% and 28%, respectively), while the representation of these learners on college-based Information and Communication Technology FE courses (23% of FE leavers) was broadly in line with the average across all subject disciplines (22%).

- Students from the most deprived areas were underrepresented on creative subjects relative to all areas of learning (34% compared to 38%). The picture did, however, vary between subjects, with a higher proportion of FE leavers from Information and Communication Technology courses (42%) coming from the most deprived areas, while these learners comprised one in five (21%) students graduating from Arts, Media and Publishing courses.

Figure 5.12: Diversity of leavers from college-based FE (education and training, aged 19+) for selected creative Tier 1 SSAs, 2022/23, England

Top-left chart (Female / Male):

	Female	Male
Arts, Media and Publishing	70%	30%
Information and Communication Technology	57%	43%
Languages, Literature and Culture	64%	36%
Total Creative FE	62%	38%
Total FE	61%	39%

Top-right chart (Ethnicity):

	Asian/Asian British	Black/African/Caribbean/Black British	Mixed/Multiple ethnic groups	White	Other ethnic group	Unknown
Arts, Media and Publishing	7%	7%	4%	75%	4%	
Information and Communication Technology	22%	18%	5%	45%	8%	
Languages, Literature and Culture	18%	14%	5%	51%	9%	
Total Creative FE	17%	14%	5%	55%	7%	
Total FE	16%	13%	5%	56%	9%	

Bottom-left chart (Learners with learning difficulties or disabilities (LLDD)):

	LLDD
Arts, Media and Publishing	33%
Information and Communication Technology	23%
Languages, Literature and Culture	28%
Total Creative FE	27%
Total FE	22%

Bottom-right chart (Deprivation quintiles):

	One (most deprived)	Two	Three	Four	Five (least deprived)
Arts, Media and Publishing	21%	24%	22%	18%	15%
Information and Communication Technology	42%	25%	15%	10%	7%
Languages, Literature and Culture	34%	23%	17%	14%	12%
Total Creative FE	34%	25%	17%	13%	10%
Total FE	38%	25%	16%	12%	9%

Source: Authors' elaboration based data from on DfE (2024), et_narts_subject_demographics and et_narts_deprivation

Notes: Data is for leavers from college-based education and training (aged 19+), as defined by the DfE. Learner characteristics (such as sex, learners with learning difficulties and/or disabilities, and ethnicity) are based on self-declaration by the learner. Indices of Multiple Deprivation (IMD) quintiles are based on the 2019 IMD rank of the learner's home postcode.

Figure 5.13: Diversity of apprentices (all ages, 16+) in creative industry employers, 2020/21, England

Female / Male

	Female	Male
Advertising and Marketing	57%	43%
Architecture	38%	62%
Design and designer fashion	42%	58%
Film, TV, video, radio and photography	52%	48%
IT, software and computer services	35%	66%
Museums, galleries and libraries	56%	33%
Music, performing and visual arts	63%	32%
Publishing	60%	40%

Learners with learning difficulties or disabilities (LLDD)

	LLDD
Advertising and Marketing	9%
Architecture	14%
Design and designer fashion	11%
Film, TV, video, radio and photography	13%
IT, software and computer services	11%
Museums, galleries and libraries	22%
Music, performing and visual arts	11%
Publishing	10%

Most deprived 20 per cent of areas

	Most deprived 20 per cent of areas
Advertising and Marketing	17%
Architecture	14%
Design and designer fashion	21%
Film, TV, video, radio and photography	14%
IT, software and computer services	15%
Museums, galleries and libraries	11%
Music, performing and visual arts	26%
Publishing	13%

Ethnicity

	Asian/Asian British	Black/African/Caribbean/Black British	Mixed/Multiple ethnic groups	White	Other ethnic group	Unknown
Advertising and Marketing	8%	6%	6%	77%		
Architecture	7%	3%	3%	79%		
Design and designer fashion	5%	5%	5%	84%		
Film, TV, video, radio and photography	9%	5%	5%	78%		
IT, software and computer services	10%	4%	4%	78%		
Museums, galleries and libraries	11%	11%	0%	78%		
Music, performing and visual arts	11%	5%	5%	74%		
Publishing	7%	4%	4%	81%		

Age group (Under 19 / 19-24 / 25+)

	Under 19	19-24	25+
Publishing		29%	64%
Music, performing and visual arts		37%	47%
Museums, galleries and libraries		44%	56%
IT, software and computer services		40%	42%
Film, TV, video, radio and photography		28%	61%
Design and designer fashion		42%	21%
Architecture		45%	34%
Advertising and Marketing		38%	50%

Source: Authors' elaboration based on data from DfE (2022a), amendment_learner_creative

Notes: Industry characteristics of apprenticeship starts in England in the creative sector, where a match has been made between the ILR and the ONS IDBR. Apprenticeship starts is the count of apprenticeship programmes that begin in an academic year – that is, the take-up of programmes.

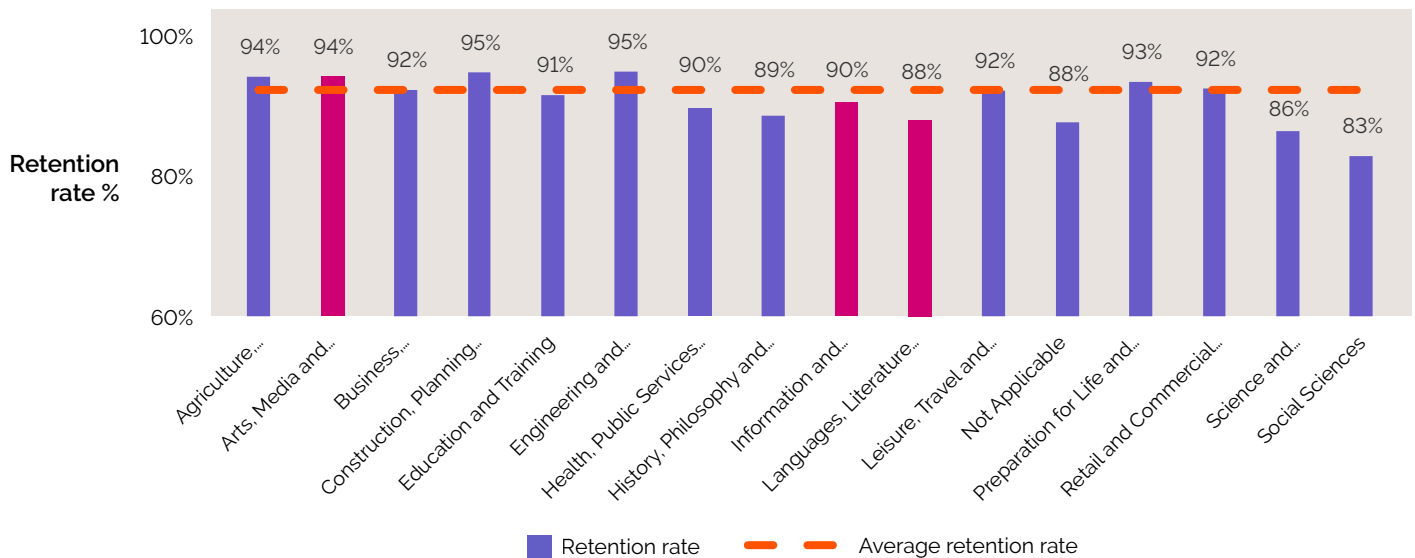# 5.6: Learner outcomes and destinations in England

It has also been of interest to explore variations in learner outcomes, including rates of achievement and learner destinations (i.e. further learning, sustained employment, earnings).

This has involved analysis of achievement data for vocational programmes, as a measure of performance in England. This includes: retention rates; achievement rates; sustained positive destinations of FE achievers; sustained employment of FE achievers; and share of employed completers working in the creative industries.

The analysis starts by looking at patterns of completion, retention and achievement by Tier 1 SSA courses. In 2022/23, there were 37,100 completers (aged 19+) on Arts, Media and Publishing courses, 60,650 on Information and Communication Technology courses, and

25,090 on Languages, Literature and Culture courses. The retention rates[57] for Arts, Media and Publishing courses (94%) was above the overall FE average (92%), but lower for students on Information and Communication Technology courses (90%) and Languages, Literature and Culture courses (88%) (Figure 5.14). The achievement rate[58] for Arts, Media and Publishing courses (92%) was also higher than the overall FE average (87%), but Languages, Literature and Culture courses had among the lowest rates of achievement (82%) and Information and Communication Technology was also below the average across all subject disciplines (84%, Figure 5.15).
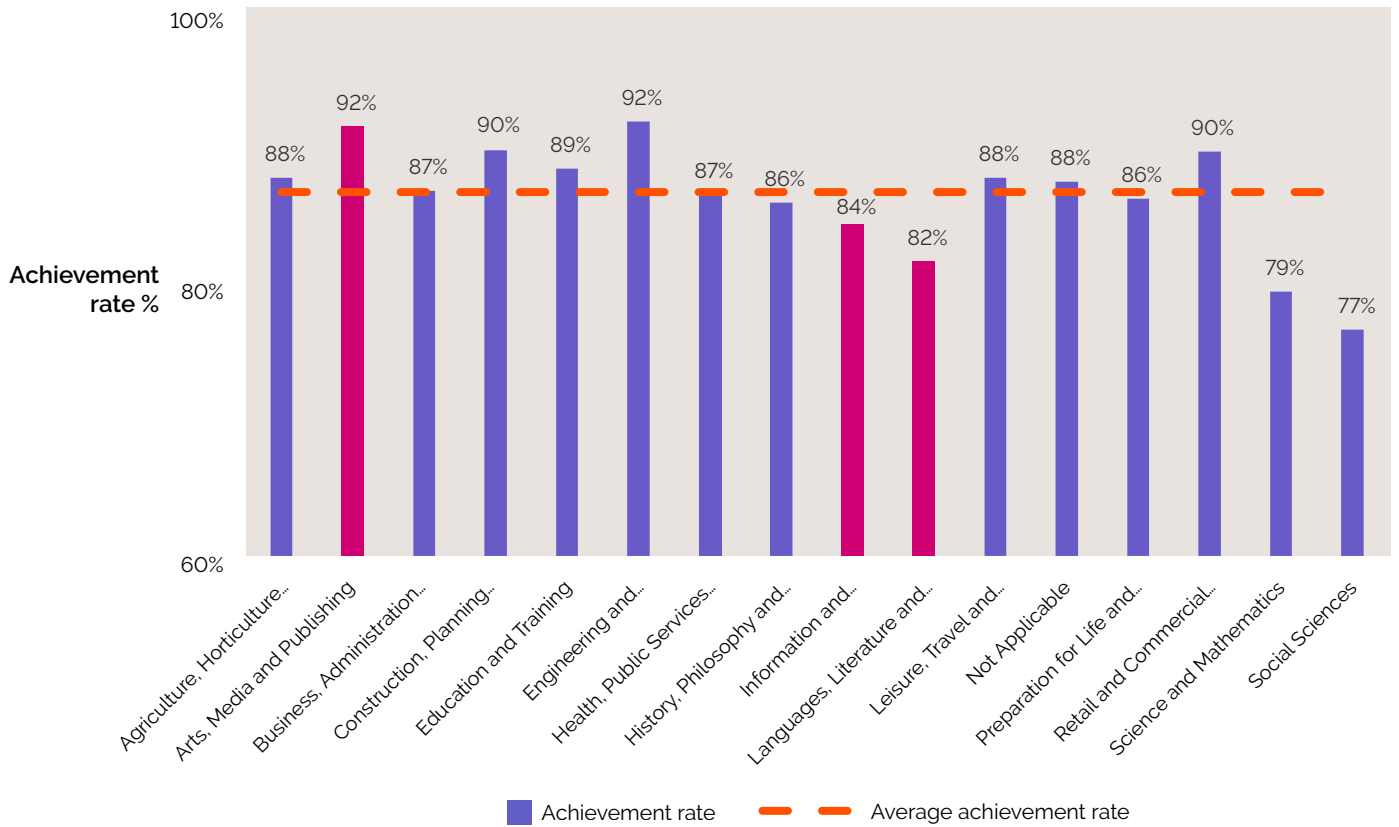
Figure 5.14: Retention rate for college-based FE (education and training, aged 19+) by Tier 1 SSAs, 2022/23, England

Source: Authors' elaboration based on data from DfE (2024), et_narts_subject_detailed

Notes: Data is for leavers from college-based education and training (aged 19+), as defined by the DfE. Retention rates are based on the individual aims that were completed in the relevant year (the Hybrid End Year). They are calculated as the number of learning aims completed divided by the number of leavers. Achievement rates are based on the individual qualification aims that were completed in the relevant year (Hybrid End Year). They are calculated as the number of aims achieved divided by the number started, excluding the aims of any learners that transferred onto another qualification within the same institution.

Figure 5.15: Achievement rate for college-based FE (education and training, aged 19+) by Tier 1 SSAs, 2022/23, England
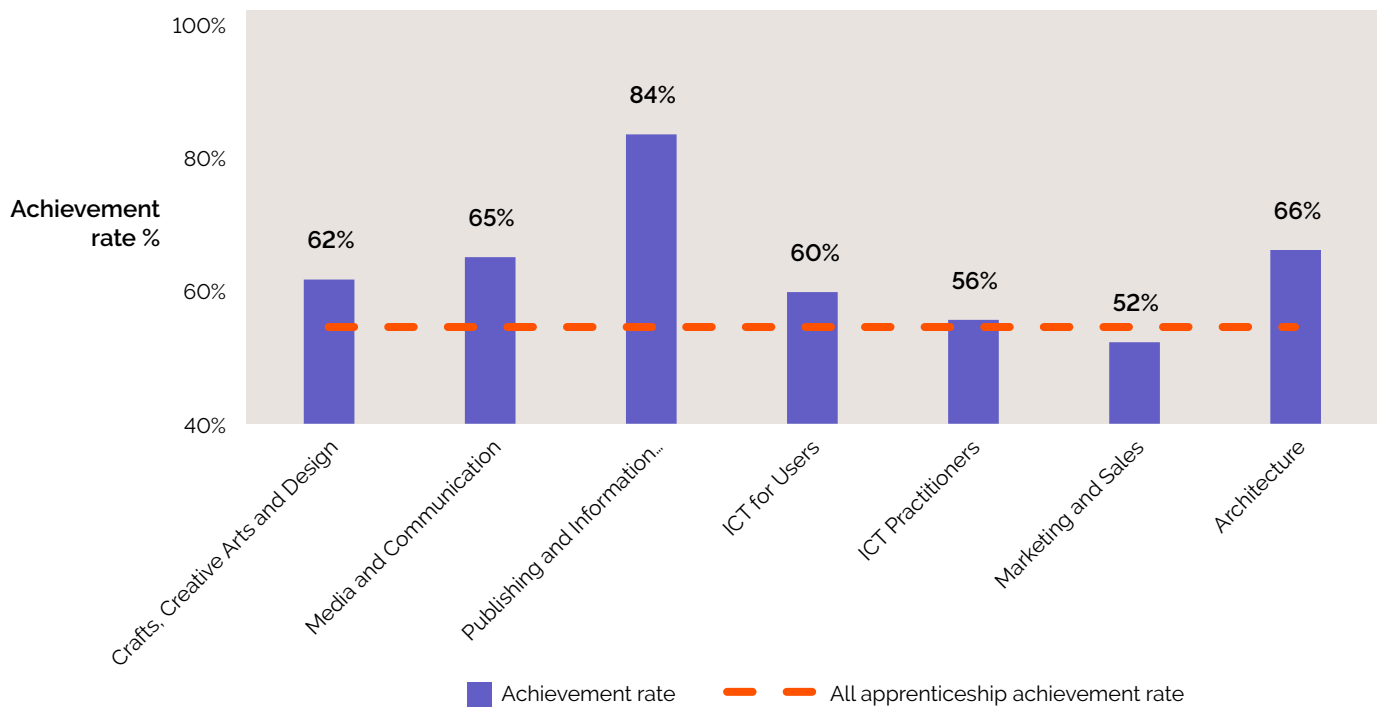

Source: Authors' elaboration based on data from DfE (2024), et_narts_subject_detailed

Notes: Data is for leavers from college-based education and training (aged 19+), as defined by the DfE. Retention rates are based on the individual aims that were completed in the relevant year (the Hybrid End Year). They are calculated as the number of learning aims completed divided by the number of leavers. Achievement rates are based on the individual qualification aims that were completed in the relevant year (Hybrid End Year). They are calculated as the number of aims achieved divided by the number started, excluding the aims of any learners that transferred onto another qualification within the same institution.

Data for achievement and retention rate of all apprenticeships was available at SSA Tier 2 for 2022/23. The achievement rates for apprenticeships overall were generally lower than for FE enrolments (55% and 84%, respectively). That said, apart from Marketing and Sales (52%), the achievement rates in creative apprenticeships were higher than for apprenticeships overall (Figure 5.16). The highest achievement rate was for apprenticeships in Publishing and Information Services (84%).[59]

Figure 5.16: Achievement rate of apprenticeships (all ages, 16+) by Creative Tier 2 SSAs, 2022/23, England
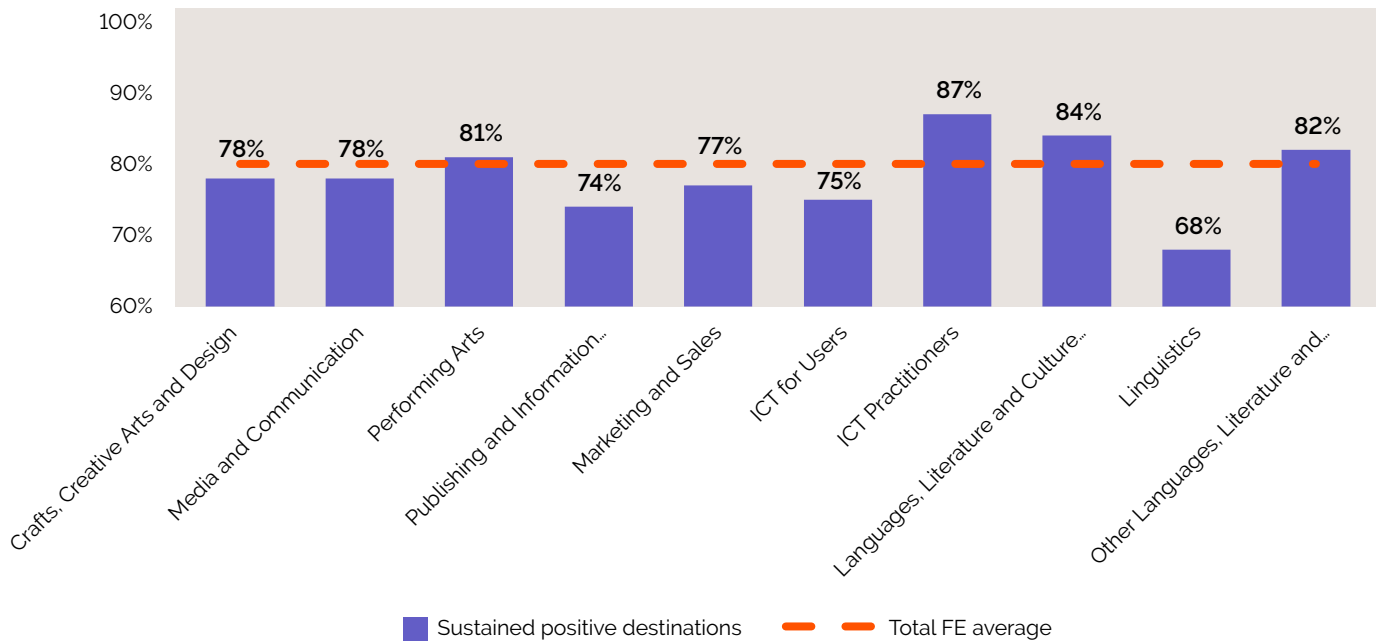

Source: Authors' elaboration based on DfE (2024), apps_narts_subject_and_level_detailed

Notes: Achievement rates are based on data from the individual apprenticeship programmes that were completed in the relevant year. They are calculated as the number of programme aims achieved divided by the number started, excluding the programme aims of any learners that transferred onto another qualification within the same institution.

The research also draws on Further Education Outcomes statistics (which are based on Longitudinal Education Outcomes data) to examine employment, earnings and learning outcomes of FE learners in England. This covers learners that achieved apprenticeships, adult FE and skills learners and completers of traineeships. It tracks their outcomes during the academic year after completion.

The analysis starts by reviewing the sustained positive destination rate, which considers the proportion of learners with a sustained positive outcome, either into learning or employment (or both). ICT Practitioners had the highest sustained positive destination rate, at 87% – higher than the average across all FE learners (80%) (Figure 5.17). In contrast, the lowest outcomes were in Linguistics (68%), Publishing and Information Services (74%) and ICT for Users (75%).

Figure 5.17: Sustained positive destinations for those who completed apprenticeships and traineeships (all ages, 16+) and college-based FE (education and training, aged 19+) by creative Tier 2 SSAs, 2020/21, England

Source: Authors' elaboration based on data from DfE (2023c), eda02. Data is from the Longitudinal Education Outcomes study, which brings together schools, FE and HE information from the DfE, employment information from HM Revenue and Customs and benefit histories from the Department of Work and Pensions.
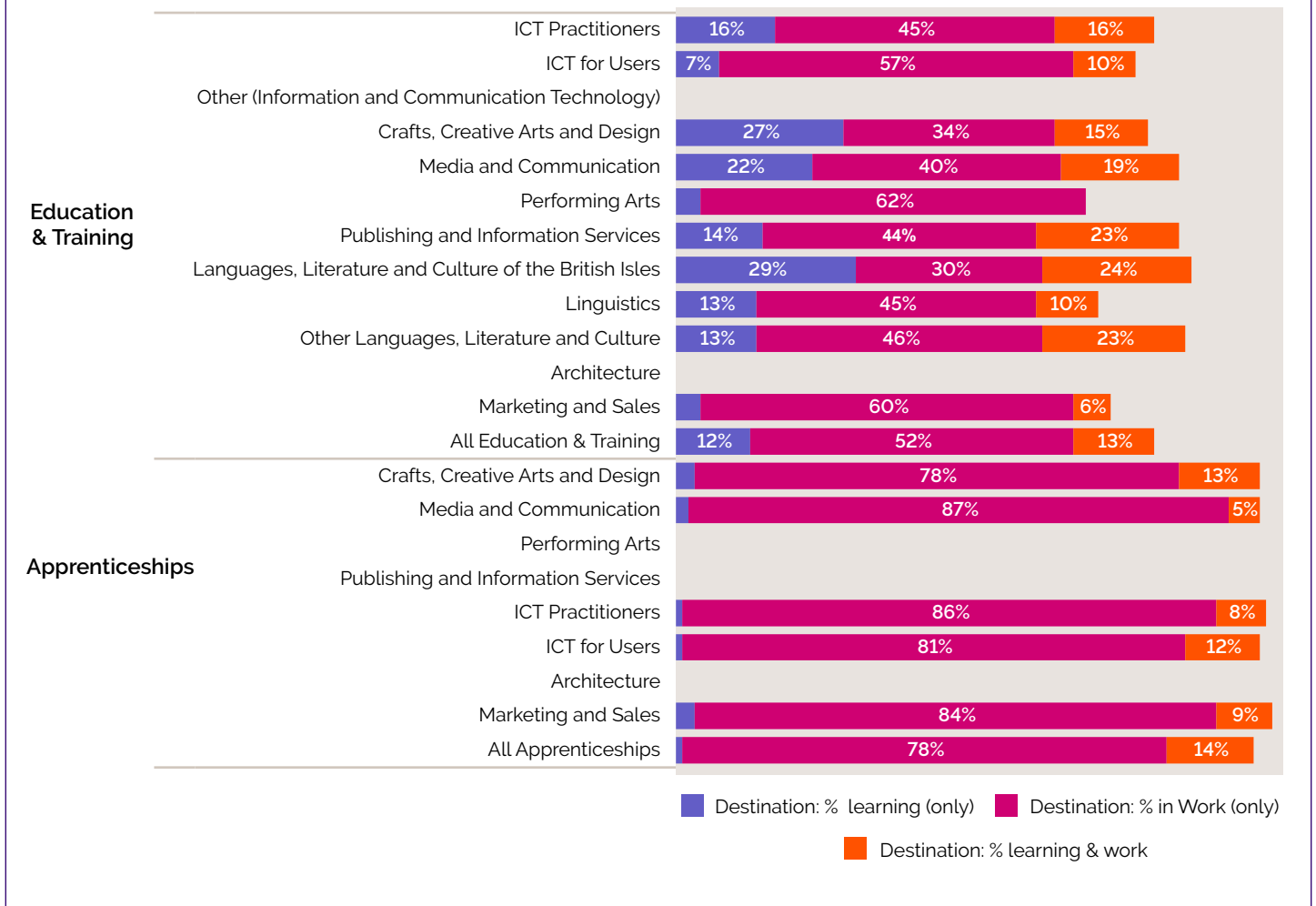
Notes: Employment and learning destinations of ESFA-funded FE learners, including all apprenticeship learners, traineeship learners and learners in college-based education and training (aged 19+). The 'sustained positive destination' measure considers the proportion of learners with a sustained positive outcome, either into learning or employment (or both). For 2020/21 achievers to be counted as having a sustained positive destination, a learner must: have a sustained positive employment outcome; have a sustained positive learning outcome (including sustained apprenticeship); or be engaged in either learning (FE or HE) or paid employment in each of the six months between October 2021 and March 2022.

We also explore the destinations of those completing creative education and training and creative apprenticeships (Figure 5.18). As for other UK nations, we observe a distinct but mixed picture among those completing creative subjects. Those that have FE and training in Languages, Literature and Culture of the British Isles (29%), Crafts, Creative Arts and Design (27%) and Media and Communication (22%) were significantly more likely to remain in learning compared to all FE students. In contrast, rates of sustained employment were considerably higher among FE students completing in Performing Arts (62%) and Marketing and Sales (60%) compared to the FE sector average (52%). Across many creative subject areas, students were also considerably

more likely to be combining work and further learning once they completed their studies – over one in four of those who completed courses in: Languages, Literature and Culture of the British Isles; Other Languages, Literature and Culture; Publishing and Information Services; and Media and Communication.

Unsurprisingly, employment destinations for apprenticeships (generally) were higher than college-based FE destinations. However, Figure 5.18 also shows that sustained employment outcomes were particularly high among those completing apprenticeships in Media and Communication (87%), ICT Practitioners (86%), Marketing and Sales (84%) and ICT for Users (81%).

Figure 5.18: Destinations of those who completed apprenticeships (all ages, 16+) and college-based FE (education and training, aged 19+) by creative Tier 2 SSAs, 2020/21, England

Source: Authors' elaboration based on data from DfE (2023c), eda02. Data is from the Longitudinal Education Outcomes study, which brings together schools, FE and HE information from the DfE, employment information from HM Revenue and Customs and benefit histories from the Department of Work and Pensions.

Notes: Employment and learning destinations of ESFA-funded FE learners, including all apprenticeship learners, traineeship learners and learners in college-based education and training (aged 19+). Data shows the percentage of learners that have a sustained positive employment outcome, have a sustained positive learning outcome (including sustained apprenticeship) or are engaged in either learning (FE or HE) or paid employment in each of the six months between October 2021 and March 2022.

Finally, we examine the industries where learners who go on to sustained employment work. These were mapped to Creative Industry two-digit SIC codes[60] to identify the SSAs where apprentices were most likely to remain employed in the creative industries (Figure 5.19).

This revealed some variation in the likelihood of securing sustained employment in the sector. For example, a higher share of learners who completed a creative apprenticeship in Media and Communications (50%) and Publishing and Information Services (50%) moved into sustained employment in the creative industries. In contrast, rates were significantly lower among those completing Marketing and Sales apprenticeships (11%) and ICT Practitioners apprenticeships (16%).

Generally, progression of learners to other forms of education and training in the creative industries was lower. Again, this was particularly true for those in ICT and Marketing and Sales – a likely reflection of the demand for these skills across the economy.

Figure 5.19: Percentage of learners who completed apprenticeships (all ages, 16+) and college-based FE (education and training, aged 19+) working in creative industries by creative Tier 2 SSAs, 2020/21, England
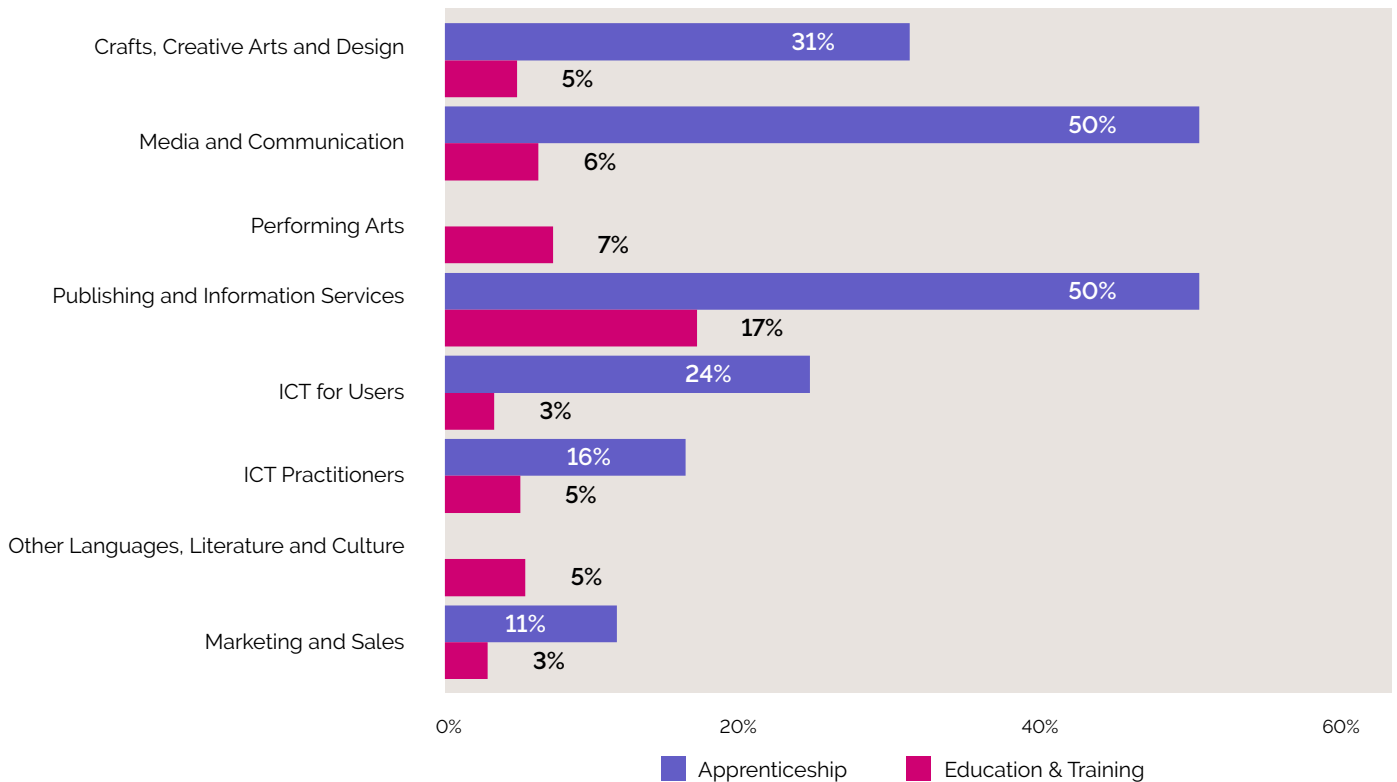
Source: Authors' elaboration based on data from DfE (2023c), sec02. Data is from the Longitudinal Education Outcomes study, which brings together schools, FE and HE information from the DfE, employment information from HM Revenue and Customs and benefit histories from the Department of Work and Pensions.

Notes: Data is for learners who have a sustained employment destination. A proxy definition of the creative industries was aggregated from Industry Divisions, including the following two-digit SIC codes: 90: Creative, arts and entertainment activities; 91: Libraries, archives, museums and other cultural activities; 62: Computer programming, consultancy and related activities; 59: Motion picture, video and television programme production, sound recording and music publishing activities; 60: Programming and broadcasting activities; 58: Publishing activities; 73: Advertising and market research; 71: Architectural and engineering activities; technical testing and analysis.

6 Conclusions

6.1: Summary

This report has presented evidence on creative further education (FE) in the four UK nations. A core intention has been to provide a comprehensive picture of a key part of the future talent pipeline, bringing together the fragmented evidence base (in total thirty-one data sources from eight different agencies) in the four UK nations.

The nature of current skills reforms in each part of the UK shows that FE has an important role to play in building the talent pipeline to the creative industries – both as a route to higher education and as a pathway into employment and to support career progression. This is not only in creative sub-sectors, but also in wider parts of the economy where creative skills are also in demand. When assessing trends across each of the devolved nations, we offer five key insights.

Firstly, creative FE is on a downward trajectory in each of the UK nations. While this is the case across the FE sector generally, in part reflecting reductions in funding for FE, enrolments in creative subjects have been declining much more rapidly than for other subject disciplines.

The reductions are stark, both in terms of their pace and the scale of losses: a reduction of over 220,000 enrolments in creative FE in England over the past decade; over 4,500 fewer creative (full-time equivalent) students in Scotland; nearly 6,000 fewer regulated creative enrolments in Northern Ireland (over the past five years alone); and over 65,000 fewer creative FE learning activities in Wales.

Secondly, apprenticeship take-up remains very low in the creative industries across all four nations. The share of all apprenticeships in frameworks or standards related to the creative industries ranges between 1.7% (Wales) and 8.7% (England). Further, upwards of 85% of these apprenticeships are in Information and Communications Technology (ICT). While these digital skills are undoubtedly in growing demand across the economy, this means that apprenticeship numbers in other creative disciplines (e.g. creative arts and design) are very low indeed. Although the research suggests the number of apprenticeships has been growing in some subjects, in some nations this has been almost entirely driven by expansion of ICT apprenticeships. Even then, in absolute terms, the increased number of creative apprenticeships pales in comparison to the reduction in other (i.e. college-based) creative FE and training.

Thirdly, creative FE is highly concentrated in urban cities and regions – Glasgow, Edinburgh, Belfast, Cardiff, Swansea, London, the South East and the West Midlands – with much more limited provision in rural areas and regions such as the North East of England, Argyll &

Bute, the Outer Hebrides, the Shetland Islands, parts of North Wales and the Welsh Valleys, and the Northern and Southern Assembly areas of Northern Ireland. This suggests that learning options may be both a casualty of and a contributor to the spatial patterns of the creative industries (further discussion on the geographies of creativity can be found in (Siepel, Ramirez-Guerra, & Rathi, 2023).

Fourthly, our assessment of retention and achievement rates paints a mixed picture across creative disciplines and UK nations. In Scotland, FE achievement rates are below average for college students studying all creative subjects, although achievement rates for Modern Apprenticeships are above average (though largely driven by IT and Telecommunications). In Northern Ireland, Wales and England, achievement rates are higher among enrolments Arts, Media and Publishing courses, but Languages, Literature and Culture tends to fall below the all-subject average. Further, the data suggests that achievement rates in creative FE (as for wider areas of learning) having been negatively impacted by Covid-19 and are yet to return to pre-pandemic levels.

Finally, while we lack a complete picture of the sociodemographic profile of learners in creative FE in each UK nation, the data we do have suggests that learners on creative courses tend to be less ethnically and socioeconomically diverse than the wider FE student population. This study also echoes wider work in finding a significant gender imbalance in IT and software, with the vast majority of those studying FE courses in these disciplines being male. In contrast, we find a higher proportion of those studying creative disciplines are disabled, have a health condition or have learning difficulties.

6.2: Policy considerations

A number of policy messages emerge from this work. Firstly, the research highlights the importance of policy commitments to strengthen FE, and in particular industry-facing technical education for the creative industries.

Across the different nations, there have been common principles and design features guiding the individual skills reform programmes. These seek to encourage learning throughout life, supporting greater inclusion in learning among adults to reskill and upskill as well as supporting young people. They also seek to strengthen employer engagement and mechanisms to enhance the responsiveness of skills programmes, including the customisation of FE and training to better meet varying spatial as well as sector labour market needs. There are activities underway in each nation that hold much promise, including the development of Foundation Apprenticeships and Graduate Apprenticeships in Scotland to extend technical pathways, the strong role of colleges in supporting key sectors in Northern Ireland, greater flexibilities being built into technical education reforms in England, and the work of Regional Skills Partnerships in Wales. However, this research has set out the scale of the challenge. Despite best intent, current policy measures are failing to stem the drastic reduction in FE enrolments in the sector or to dramatically scale up apprenticeships to fill the void this will leave. The risk this poses to the creative industries, as they look to expand in the years ahead, warrants a redoubling of efforts – both by policymakers and by creative employers – to make creative FE a viable and valued route into the sector.

However, our research suggests that a policy intent simply to grow the volume of learners enrolled in creative FE will not, in itself, be enough. The mixed picture of achievement and outcomes points to a need for sharper focus on the quality and labour market relevance of FE as well as the extent to which courses retain students, support their success and enable their progression to further study or the world of work. The spatial patterns of creative FE suggest that efforts to 'level up' the creative industries and grow creative clusters across the UK will need a strong focus on skills provision to ensure the concomitant development of the creative industries and the talent base needed to support them.

Finally, expanding technical pathways into the creative industries is often seen as a key mechanism for promoting equality, diversity and inclusion. While there is well-developed evidence that FE, not least apprenticeships, can be good for diversity and inclusion (including social mobility) e.g. (Carey, O'Brien, & Florisson, 2021), our analysis of the profile of learners currently studying creative disciplines suggests that this is not a guaranteed outcome. Instead, there is a need for industry stakeholders, employers and skills providers to work collaboratively to ensure that the FE sector can support a skilled and diverse talent pipeline to the creative industries to ensure industry makes full use of the diversity of the workforce that exists in the UK.

6.3: Future research

A key focus for this first State of the Nation report for the Education, Skills and Talent theme has been to bring together the fragmented evidence base on FE for the creative industries.

While this report aims to provide a valuable reference document for policymakers, industry, and education and skills providers, there remains a need to address, on an ongoing basis, underlying challenges in accessing data on the talent pipeline to the creative industries. In particular, there is scope to improve data availability and extend the research in a range of areas.[61]

- This research has focused on FE in creative disciplines, which would develop skills aligned to creative occupations. However, the creative industries employ a much wider range of non-creative roles – from business professionals and accountants to construction trades. Further studies could look more widely at the skills being developed in the education system and their relevance to the creative industries, including creative and non-creative roles.

- There is a need to work in a more co-ordinated way with different partners across the UK skills systems to agree a more bespoke process for collecting and reporting data on FE. This needs to include the development of more customised definitions of subjects aligned to the creative industries. Throughout the study, we used publicly available data, disaggregated by subject disciplines as defined by superclass categories (in the case of Scotland) or sector subject areas (in the case of England, Scotland and Wales). Future research could look to develop customised and consistent definitions for creative sub-sectors and provide access to customised tables from data owners.

- There is scope for more detailed research – for instance, exploring learning pathways for different sub-sectors, occupations and places, looking in depth at creative skills provision in different (including nascent) creative clusters, and examining how learner outcomes or destinations vary based on the personal characteristics or backgrounds of learners. There is also a need for qualitative research exploring the nature and content of FE courses and the way they are delivered, and how this impacts the extent to which learners are equipped with the technical and transversal skills they need to build successful careers in the creative industries.

- Additional work could also seek to understand what works in stimulating greater participation in different creative courses and learning pathways, and the extent to which this aligns with current and future skills needs. This might benefit from comparison of creative education and skills programmes (such as apprenticeships) in different parts of the UK to understand the effects of different design features.

- Finally, there is a need to explore employer perspectives on the skills system, their awareness and engagement with different parts of the system and what inhibits and enables this. This will be the focus of future Creative PEC State of the Nations reports.

Annex

Definitions

Defining the creative industries

The Department for Digital, Culture, Media and Sport definition of the creative industries covers: Advertising and marketing; Architecture; Crafts; Design and designer fashion; Film, TV, video, radio and photography; IT, software and computer services; Publishing; Museums, galleries and libraries; and Music, performing and visual arts.

The definition of the creative industries does, however, differ in some devolved nations.

For instance, in Wales, the creative industries covers: Screen; Music; Publishing; Digital; and Emerging. In Scotland, the definition covers: Advertising; Architecture; Visual Art; Crafts and antiques; Fashion and textiles; Design; Performing arts; Music; Photography; Film and video; Computer games; Radio and TV; Writing and publishing; Libraries and archives; Software/electronic publishing; and Cultural education.

Defining creative further education

This report presents publicly available data. The definitions of subject disciplines do not align directly with creative industries or occupations. As such, proxy definitions of creative further education (FE) are used. These vary between the UK nations.

In England, Northern Ireland and Wales, creative FE is defined using sector subject areas (SSAs). When data is available at Tier 1 (broad subject) level, this covers: Arts, Media and Publishing; Languages, Literature and Culture; and Information and Communication Technology. Where data is available at a more granular level (SSA Tier 2), relevant subject disciplines are: Media and Communications; Crafts, Creative Arts and Design; Performing Arts; Publishing and Information Services; Languages,

Literature and Culture of the British Isles; Other Languages, Literature and Culture; Linguistics; ICT for Practitioners; ICT for Users; Other ICT; Architecture; and Marketing and Sales. In some nations, data is available for some Tier 2 SSAs, but not all are of relevance.

In Scotland, creative FE is defined using superclass subject titles. Those of relevance are: Arts and Crafts, Authorship/Photography/ Publishing/Media; Information Technology and Information; and Performing Arts.

It should be noted that data for apprenticeships can be defined differently to provider-based FE, available for specific apprenticeship frameworks or standards, which have also been subject to change over time.

Glossary

Creative further education: Creative further education refers to further education in subject disciplines aligned to creative occupations. The definition of creative FE varies across different UK nations. Please refer to Annex A for further discussion.

Destination: The destination of learners refers to what students do after completing their studies. This can include further study, employment, self-employment and unemployment.

Enrolments: Enrolments (sometimes referred to as learning aims) are a count of the number of student enrolments on a course for each stated academic period. Learners will be counted for each aim they are studying and so can be counted more than once.

Further education: Further education is defined as any study after secondary education that is not higher education delivered by higher education institutions (i.e. universities). This includes both academic qualifications and technical and vocational education and training. Further education can be provider-led (i.e. delivered by a college) or work-based (i.e. apprenticeships).

Higher education: Higher education is defined as education that comes after secondary and further education. This can include both academic qualifications, such as an undergraduate degree, or higher technical and vocational education.

Provider-based further education: Provider-based further education (sometimes just referred to as education and training) refers to further education delivered primarily in an educational setting, often further education colleges.

Qualification level: Qualification levels (sometimes referred to as the level of learning) refers to the difficulty of the qualification. Qualification levels are aligned to national qualifications frameworks, which vary across the UK nations: England and Northern Ireland use the Regulated Qualifications Framework, Wales uses the Credit and Qualifications Framework and Scotland uses the Scottish Credit and Qualifications Framework. The QAA has produced a useful guide comparing qualifications across the nations, available here.

Retention rate: The retention rate (sometimes referred to as the completion rate) is defined as the share of enrolments that are completed by students.

Success rate: The success rate (sometimes referred to as the achievement rate) is defined as the share of enrolments that are successfully completed – that is, where the student achieves the qualification.

Technical and vocational education and training: Technical and vocational education and training refers to education and training that develops knowledge and skills related to specific occupations.

Work-based further education: Work-based further education (sometimes referred to as work-based learning) refers to further education delivered primarily in the workplace, including apprenticeships.

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Northern Ireland

Department for the Economy (2024a)	Further education sector activity in Northern Ireland
Department for the Economy (2023) Table A13	Further education sector activity by Assembly area
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Department for the Economy (2022b) Table B6	Higher Level Apprenticeships starts at FE colleges
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Wales

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Qualifications Wales (2023)	Vocational and Other Qualifications Quarterly
Welsh Government (2023) Table 2_12	Consistent performance measures for post-16 learning (achievement)

England

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Data statement

All the data used for this report is freely available from the original sources listed in the data reference list. Further data tables are published alongside this report on the Creative PEC website.

Endnotes

1. The Department for Digital, Culture, Media and Sport (DCMS) definition of the creative industries covers: Advertising and marketing; Architecture; Crafts; Design and designer fashion; Film, TV, video, radio and photography; IT, software and computer services; Publishing; Museums, galleries and libraries; and Music, performing and visual arts. The definition of the creative industries does, however, differ in some devolved nations. See Annex A for definitions and the Glossary of terms used throughout this report.

2. See the data reference list and data statement.

3. These occupations include Standard Occupational Classification codes 1–3 – that is, managerial, professional and associate professional occupations.

4. Wider reviews include: the Enterprise and Skills Review in 2017 (SG, 2017); the SFC review of the tertiary education sector in 2021 (SFC, 2021)); the post-school learning system review (SG, 2023), the Careers Review in 2022 (SDS, 2022); the review of the qualifications and assessment system in 2023 (Hayward, 2023); and the review of adult learning (SG, 2022).

5. SDS leads on producing the sectoral and regional skills assessments (see **here**)

6. There are over 500 Scottish Vocational Qualifications available in a range of sectors, including the creative industries, such as: accounting; business and administration; management; childcare; construction; dental nursing; oil and gas (see **here**).

7. There are a wide range of SQA-awarded qualifications linked to the creative and cultural sector (see **here**). Further, the MAs Framework supports several creative areas: Creative and Cultural; Creative Media; Creative; Design; Fashion and Textile Heritage; Digital Marketing; IT and Telecommunications; and IT and Telecommunications Technical (see **here**).

8. Data includes FE institutions but excludes FE provision through school sixth forms, HE institutions and private providers.

9. FAs have been introduced, since 2016, at the senior phase of school, from the age of 15 to 18. FAs have focused at Level 6 of the SCQF and there are now 12 FA frameworks available. Yet FAs are also under development at levels 4 and 5 (in Automotive, Construction and Hospitality). MAs have run since the 1990s and are offered at SCQF levels 4 and 5 up to Level 11. There are more than 100 different MA types available. All MAs include certification of Core Skills. MAs last between one and four years depending on the apprenticeship type and framework. GAs were introduced in 2017 and operate from Level 9 to Level 11 of the SCQF. They provide a chance to develop higher skills while at work and with the support of a university.

10. It is important to note the apprentices are not necessarily employed in the creative industries, but could be completing their apprenticeship with employers in other sectors.

11. The different levels of the SCQF are explained in their interactive tool (see **here**).

12. The Scottish Government statistical release is available **here**.

13. For further discussion, please see **here**.

14. See, for example, the current policy commitments of the Department for Communities in Northern Ireland (**here**).

15. For example: Graduating to Success: A Higher Education Strategy for Northern Ireland in 2012; Securing our Success: The Northern Ireland Strategy on Apprenticeships in 2014; Generating our Success: The Northern Ireland Strategy for Youth Training in 2015; Further Education Means Success: The Northern Ireland Strategy for Further Education in 2016; and Preparing for Success 2015-2020: A Strategy for Careers Education and Guidance in 2016.

16. Further information on regulated qualifications within FE can be found **here** and at Ofqual **here**.

17. Data includes FE institutions but excludes FE provision through school sixth forms, HE institutions and private providers.

18. Regulated enrolment data is available by SSA, which is derived from the official Ofqual (Office of Qualifications and Examinations Regulation) Register of Regulated Qualifications, based on the qualification or unit code.

19. For further information on the ApprenticeshipsNI programme, visit the NI Direct **website**.

20. The Sectoral Partnerships involve employers and/ or employer body organisations, the Council for the Curriculum, Examinations and Assessment, and FE, HE and DfE representatives (see **here**).

21. Arts, Media and Publishing, Languages, Literature and Culture, and Information and Communication Technology were combined to create a proxy for creative enrolments for spatial analysis.

22. Caution should be exercised when comparing the figures presented at the subject level (which include regulated enrolments) and the FE sector averages (which consider all enrolments).

23. While the research sought to consider Longitudinal Education Outcomes for FE graduates, including what they go on to do in the world of work, at the current time, there is limited Longitudinal Education Outcomes data available in Northern Ireland. This is an important area of ongoing work for the Department for the Economy Analytical Services Division, discussed further **here**.

24. The survey is undertaken approximately six months after course completion. It provides a snapshot of the immediate added value to FE college leavers of completing and achieving a regulated qualification at Level 3 or below in the FE sector. The data was collected in March 2022 for the year 2020/21, and there was a response rate of 19.2%.

25. The four Regional Skills Partnerships are: South East Wales Cardiff Capital Region Skills Partnership; North Wales Regional Skills Partnership; South West Regional Learning and Skills Partnership; and Mid Wales Regional Skills Partnership (see **here**).

26. For example: **Aligning the Apprenticeship Model to the Needs of the Economy** in 2017 (WG, 2017); **Wales 4.0: Delivering Economic Transformation for a Better Future of Work** in 2019 (Brown, 2019); **Wales Innovates: Creating a Stronger, Fairer, Greener Wales** in 2023 (WG, 2023); and **A Review of Vocational Qualifications in Wales** in 2023 (Lusher, 2023).

27. For learners of 16 years and over, see the Further and Higher Education Act 1992, Learning and Skills Act 2000 and the Learning and Skills (Wales) Measure 2009. Legislation relating to apprentices is contained in the Apprenticeships, Skills, Children and Lifelong Learning Act 2009. Furthermore, with the introduction of the Commission for Tertiary Education and Research (CETR), the planning and funding of all post-16 education and training, including higher education (HE), will change in 2024, following the Tertiary Education and Research (Wales) Act 2022.

28. Further information of the FE institutions operating in Wales can be found **here**. Many FE institutions offering higher-level provision usually do so in partnership with a university.

29. All non-degree qualifications available for public funding in Wales, up to the age of 19, must be 'approved' or 'designated' as eligible for funding by Qualifications Wales as the independent regulator for non-degree qualifications. Qualifications Wales regulates awarding bodies and the qualifications they offer in Wales. Each qualification is part of the Credit and Qualifications Framework for Wales.

30. Jobs Growth Wales+ is a training and development programme for 16- to 18-year-olds not engaged in post-16 education, training or employment. Jobs Growth Wales+ training statistics are recorded separately from WBL statistics.

31. Data includes FE institutions but excludes FE provision through school sixth forms, HE institutions and private providers.

32. Figures for the latest year are presented here but please note available time periods vary by qualification and source. All figures have been rounded to the closest multiple of 5 and so may not sum to total. All non-zero values less than 5 have been suppressed and are denoted by an asterisk (*).

33. Further information on apprenticeships is available from **Apprenticeships Cymru** and on the Welsh Government **website**.

34. Further information is available **here**.

35. Further information on apprenticeships starts are available **here**.

36. To create a proxy for creative learning activities for spatial analysis, the SSA Tier 1 creative subjects (i.e. Arts, Media and Publishing; Languages, Literature and Culture; Information and Communication Technology) and SSA Tier 2 subjects (i.e. Architecture; Marketing and Sales) were combined. Students were then assigned to one of the 22 Welsh Unitary Authorities using their recorded home postcodes.

37. North Wales contains Isle of Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire and Wrexham. Mid Wales contains Powys and Ceredigion. South West Wales contains Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot. South East Wales contains Bridgend, The Vale of Glamorgan, Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire, Newport and Cardiff.

38. The Welsh Government are working to develop a consistent set of destinations measures for post-16 learners (see **here**). At the time of writing, data is not published for different subject disciplines.

39. Historic data on FE outcomes has been discontinued, as the statistics have been replaced by the consistent performance measures for post-16 learning. Data is only available for 2021/22. Data was not available for Language, Literature and Culture.

40. Attainment rate for apprenticeships is available by SSA. Data is suppressed when based on less than 23 apprenticeships, such as for Arts, Media and Publishing apprenticeships in in 2021/22. Data for the years 2019/20 and 2020/21 were not produced due to the disruption of the pandemic.

41. **DFE-00031-2011.pdf (publishing.service.gov.uk)**.

42. Lord Sainsbury (2016) **Post-16 Skills Plan**.

43. For further information, visit the UK government website (**here**).

44. The DfE is partnering with the Gatsby Foundation to support the network. Further information can be found at the **DfE-funded website**.

45. There is a broad spread across England: 14 colleges in the North East; 40 colleges in the North West; 24 colleges in the West Midlands; 22 colleges in the South West; 26 colleges in Yorkshire and the Humber; 13 colleges in the East Midlands; 21 colleges in the East of England; 32 colleges in London; and 33 colleges in the South East.

46. In 2023 there were 1,305 active independent training providers on the UK Government's Apprenticeship Register (**here**) and over 1,700 publicly funded independent training providers delivering education, training and/ or apprenticeships recorded on the Ofsted (Office for Standards in Education, Children's Services and Skills) systems. There are also different types of not-for-profit, publicly funded training providers. The biggest group is represented by local authorities delivering community learning, often in partnership with charities and trusts specialising in training to disadvantaged learners.

47. See, for example: Institute for Government (2022) **'Churn in "levelling up" policies in the UK'**; Westwood, A., Sensier, M. and Pike, N. (2021) **Levelling Up, Local Growth and Productivity in England**, The Productivity Institute, Productivity Insights Paper No. 005; and Keep, E., Richmond, T. and Silver, R. (2022) **Honourable Histories: 30 years of Reform in Further Education 1991-2021**.

48. Data includes FE institutions but excludes FE provision through school sixth forms, HE institutions and private providers.

49. Statistics on aged 16-18 activity that are delivered in FE institutions and schools are also not included in the releases. Other statistical publications cover this type of post-16 learning, for example Participation in education and training and employment age 16 to 18, but do not currently offer a breakdown by subject discipline. Please refer to DfE's Further education and skills statistics methodology document for further information.

50. See **https://www.gov.uk/government/publications/ dcms-sectors-economic-estimates-methodology**.

51. Figures for the latest year are presented here, but please note available time periods vary by qualification and source. All figures have been rounded to the closest multiple of 10 and so may not sum to total.

52. Further information on apprenticeships can be found on the UK government-backed Apprenticeship site (**here**) and on the GOV.UK **website**.

53. Levy-paying employers can access funding equal to 110% of the amount of the levy paid (i.e. the full costs and a 10% top-up). Non-levy-paying employers – and those who have exhausted their fund – receive a subsidy for 95% of the cost of apprenticeship training and must cover the remaining 5%.

54. See **Apprenticeships and traineeships, Academic year 2022/23 – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)**.

55. Data is only available for apprenticeship starts by SSA Tier 2 and not for apprenticeships based with employers in the creative industries.

56. SSA Tier 1 Arts, Media and Publishing, Languages, Literature and Culture, and Information and Communication Technology were combined to create a proxy for creative enrolments for spatial analysis, as regional enrolment data was not available at SSA Tier 2. Geography is based on the home postcode of the learner. Where the postcode is outside of England or not known, it is included in the 'Outside of England and unknown' category.

57. Retention rates are based on the individual aims that were completed in the relevant year (the Hybrid End Year). They are calculated as the number of learning aims completed divided by the number of leavers.

58. Achievement rates are based on the individual qualification aims that were completed in the relevant year (Hybrid End Year). They are calculated as the number of aims achieved divided by the number started, excluding the aims of any learners that transferred onto another qualification within the same institution.

59. The only data available for creative industry employer apprenticeships was the volume of achievements, but we did not have the corresponding data on starts so it was not possible to calculate an achievement rate.

60. Publishing activities (58), Motion picture, video and television programme production, sound recording and music publishing activities (59), Programming and broadcasting activities (60), Computer programming, consultancy and related activities (62), Architectural and engineering activities; technical testing and analysis (71), Advertising and market research (73), Creative, arts and entertainment activities (90) and Libraries, archives, museums and other cultural activities (91).

61. The data that underpins the research does not currently include FE provision through school sixth forms, HE institutions and private providers. Further, there remains important differences in variable, subject and sector definitions in each nation. Future research could seek to work with data owners in each of the devolved nations to incorporate additional datasets and to further standardise definitions, to support a rounder and more comparable picture of the evolution of creative FE in the four UK nations.

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