Enabling Growth in the New Anglia Creative Industries Sector through Skills Development

Creative Industries Sector Skills Plan

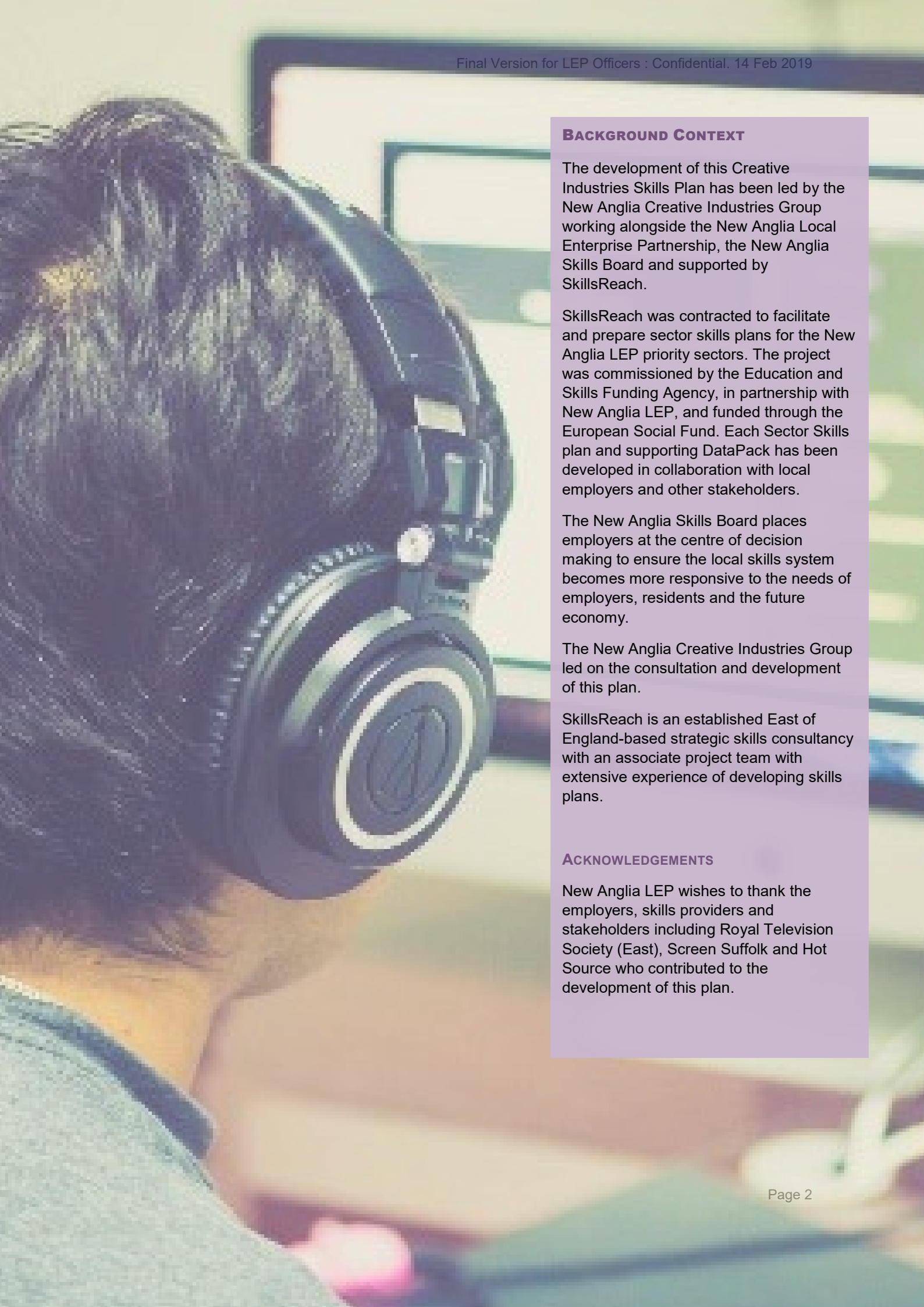
Version for New Anglia Skills Board

CONFIDENTIAL

28 February 2019

NEWANGLIA
Local Enterprise Partnership
for Norfolk and Suffolk

European Union
European
Social Fund



Background Context

The development of this Creative Industries Skills Plan has been led by the New Anglia Creative Industries Group working alongside the New Anglia Local Enterprise Partnership, the New Anglia Skills Board and supported by SkillsReach.

SkillsReach was contracted to facilitate and prepare sector skills plans for the New Anglia LEP priority sectors. The project was commissioned by the Education and Skills Funding Agency, in partnership with New Anglia LEP, and funded through the European Social Fund. Each Sector Skills plan and supporting DataPack has been developed in collaboration with local employers and other stakeholders.

The New Anglia Skills Board places employers at the centre of decision making to ensure the local skills system becomes more responsive to the needs of employers, residents and the future economy.

The New Anglia Creative Industries Group led on the consultation and development of this plan.

SkillsReach is an established East of England-based strategic skills consultancy with an associate project team with extensive experience of developing skills plans.

Acknowledgements

New Anglia LEP wishes to thank the employers, skills providers and stakeholders including Royal Television Society (East), Screen Suffolk and Hot Source who contributed to the development of this plan.

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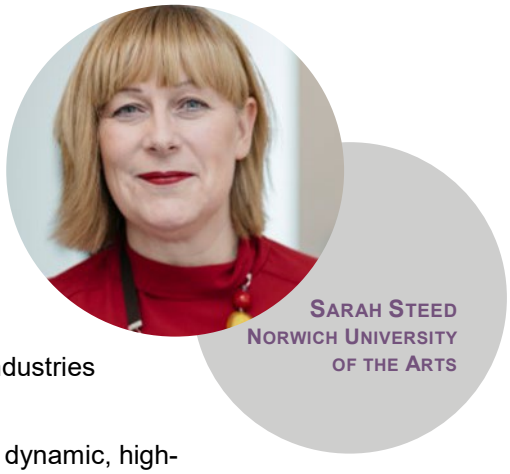
Introduction from the Chair of the New Anglia Creative Industries Task and Finish Group



This *Creative Industries Skills Plan for New Anglia* sets out a collective vision for how skills development can support the growth of our high potential sector which, although very diverse, shares a simple, common purpose of making things using creative digital technologies.

This plan is a key step to strengthening local partnerships to ensure skills investment supports businesses and local residents, to enable them to prosper through local sector growth. We look forward to collaboration between local employers and education providers to support the development of the New Anglia Creative Industries sector.

Our ambition is to add major value to support the development of a dynamic, high-profile inclusive New Anglia Creative Industries sector that contributes right across the New Anglia economy and beyond; with local career pathways, collective skills leadership, smooth transitions into work; and a cutting-edge local workforce

This plan recognises the enormous potential of our sector locally and will focus upon all of New Anglia seizing the opportunity for a 'joined-up sector,' whilst recognising the importance of stakeholders that have a specific focus such as screen, culture, ICT

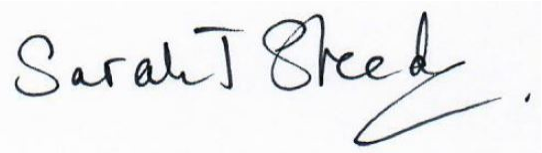
The Creative Industries Group has led the development of this plan and will steer its implementation, working in partnership with other key stakeholders for various sector elements.

The Skills Plan has three key priorities:

1. Ensuring clearer, more diverse pathways for people – especially local people – to enter the sector with local employers
2. Improving the transition from education into the workplace or business
3. Supporting our local workforce (including freelancers) to gain and sustain competitive advantage through their skillsets

To achieve this, we will need to collaborate, be even more connected and share best practice across the Creative Sector and beyond.

We look forward to working with existing and new partners to implement an action plan to make a real difference to the sector, the region and its residents.



Chair

New Anglia Creative Industries Group

The steps towards a Skills Plan

RAISING COMPETITIVE ADVANTAGE FOR NEW ANGLIA'S CREATIVE INDUSTRIES SECTOR

The steps involved in devising a sector skills plan to support the New Anglia Local Enterprise Partnership and its partners in developing a competitive and sustainable local economy

Mapping

Collaborative

- Collaborative approach with stakeholders, employers and providers, including:
  - Inception meeting with New Anglia LEP, Norfolk and Suffolk County Councils and business representatives
  - A New Anglia Creative Industries Task & Finish Group, chaired by Sarah Steed of Norwich University of the Arts (NUA) to steer the consultation and development of the plan. The group recommended sources and direction for research and consultation, and contributed to the articulation of the plan priorities and initial interventions

Evidence based

- Quantitative assessment of the labour market and economic data, locally and in the national context, including:
  - Desk-based research gathering evidence from national, sector and local reports on the local economy, the creative industries sector and local groups, initiatives and plans
  - Data-analysis utilising a range of national and local data sources including: ONS / UKCES / ESFA DataCube / East of England Forecasting Model / Burning Glass

Employer-led

- Qualitative cross-cutting analysis through
  - employer consultation using online surveying
  - stakeholder consultation using both individual interviews and group meetings
- What we asked:
  - What is the current and future skills supply and demand to support sector growth?
  - What actions are needed to address identified skills and workforce challenges?

development

Structural & Strategic

- Focus on the strategic structural skills issues that increase:
  - the effectiveness of those providing skills services locally
  - the investment made nationally in building a world-class skills infrastructure;
  - the leadership that employers can develop by articulating and taking ownership of their future skills needs.

Long Game & Quick Wins

- Set out a plan with both quick wins and longer-term strategic interventions where industry can help by taking the lead, steering and delivering interventions, investing in the sector's future alongside the public sector

Steer & Oversight

- Review and approval gateways throughout, via:
  - The Task & Finish Group
  - Stakeholders and providers
  - New Anglia LEP Officers
  - New Anglia Skills Board

The Skills Plan Overview

Shaping the future for our makers using creative digital technologies

Our ambition is for a dynamic New Anglia Creative Industries sector that is high performing, inclusive and contributing across the New Anglia economy and beyond.
Our vision is an environment where creative businesses can thrive and innovate and where local people can make the most of their talents to build careers and explore entrepreneurial ambitions.
Our focus is to realise the tremendous growth potential of this sector through inspiring our future talent and ensuring smooth transitions to work, supporting local career progression.

Through collective skills leadership, our initial focus will be on:

- Improving local career pathways
- Smoothing out transitions to work
- The lifelong learning of our cutting-edge local businesses and employees

Realising the full potential of people and business in New Anglia

Priority 1

Improving local career pathways

- A more diverse sector workforce in New Anglia
- A clear sector route map demonstrating a greater diversity of routes into the sector
- Identifying stronger apprenticeship pathways
- Boosting work experience opportunities – particularly with small / rurally-located businesses
- Attracting great talent to study and work in New Anglia

Priority 2

Smoothing out the transitions between education and local work opportunities

- A more diverse sector workforce in New Anglia
- Communications and support for new entrants regarding employer expectations of technical and creative business skills for new entrants
- Strengthening partnerships between local educators and local business
- Retaining creative talent in New Anglia

Priority 3

Supporting the upskilling of cutting-edge local businesses and employees

- More small / micro businesses growing and benefiting from skills investment
- Local CPD becoming a strength of the region
- Creative local alternatives to national funding 'fill the gap' for small businesses

Intervention 1	Intervention 2	Intervention 3	Intervention 4	Intervention 5
Representing and championing the sector to potential new entrants	Identifying new apprenticeship pathways	Pilot of a CI Sector business/work experience hub	Developing a CI Graduate Academy	Appraising the feasibility of a New Anglia Creative CPD Hub

INTERVENTION TIMELINE **Development Phase : June 2019 to May 2020**

Built upon a sector-wide collective skills leadership foundation

A new and influential collective skills voice for New Anglia Creative Industries, complementing existing interest groups and building new conduits to ensure a representative voice from across the sector

SKILLS VOICE TIMELINE **Foundation Phase : May 2019**

A creative opportunity for New Anglia

The economic perspective for the sector

Creative industries are the fastest growing part of the UK economy and are recognised as having huge potential.

This section reviews the economic picture, drawing on the national and local evidence base and relevant feedback from the employer consultation and stakeholder interviews conducted during the development of this skills plan.

In reviewing both national statistics and local data, different organisations may use different categorisations, meaning data may not be directly comparable, but we have included such comparisons where it may aid understanding.

Specifically, the local evidence base has identified ten sub-sector groupings, as listed alongside, which have been adopted to reflect the specific profile and priorities of New Anglia. However, these do not align with the national sector categories and locally Music & Performing Arts is led by the New Anglia Culture Board through the Cultural Sector Skills Plan.

A comprehensive DataPack (available on request) has also been produced cataloguing the extensive data analysis undertaken in developing this plan.

THE POWER OF TEN...

- Advertising & Marketing
- Architecture
- Crafts
- Fashion
- Film, TV and Radio
- IT, Software & Computer Services
- Music & Performance
- Publishing
- Specialised Design
- Textiles

The task and finish group identified ten defined operating areas that reflect the local composition of the creative industries where 'makers using creative digital technologies' are operating

Valuing the Creative Industries sector

Economic Contribution

Nationally, the creative industries account for 3.12m jobs (Figure 1) and £101.5bn (Figure 2) of Gross Value Added (GVA)[1]. The sector is growing twice as fast as the economy as a whole and the

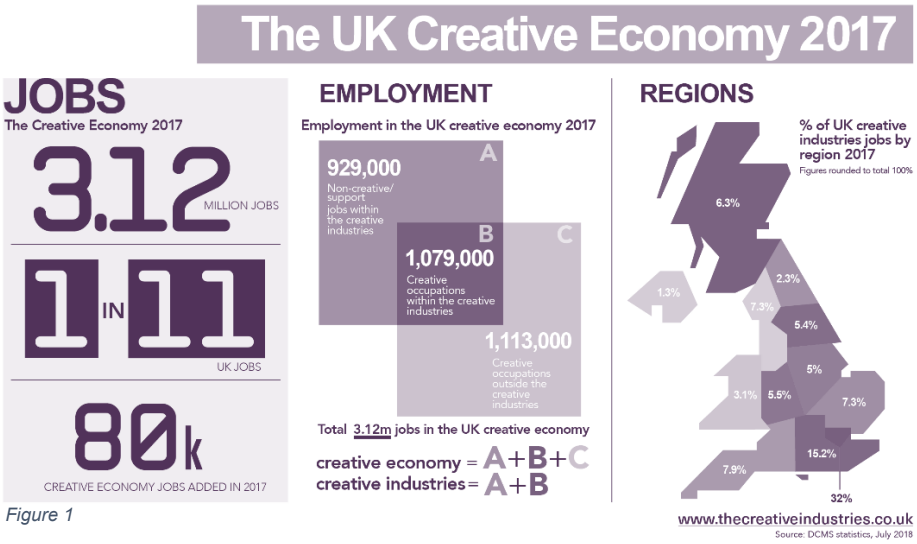


Figure 1

Government's *Industrial Strategy: Creative Industries Sector Deal* describes the Creative Industries as lying at the heart of the nation's competitive advantage.

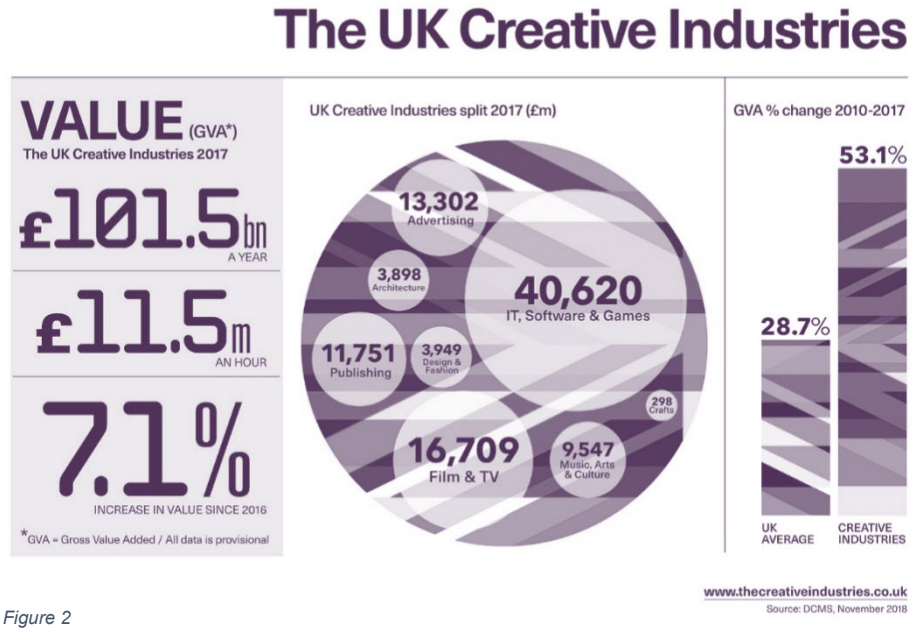


Figure 2

Through its rapid expansion (Figure 1 and Figure 2) the sector is providing new job opportunities and increased GVA, and making an impact on other sectors, such as boosting the visitor economy and playing an increasingly important role in new areas through innovative engagement strategies such as gamification. UK labour market projections show that the rate of growth for creative occupations will be more than double the average job growth across the whole UK economy between now and 2024. Film and high-end TV alone attracted over £2bn of inward investment to the UK in 2017, creating employment, boosting tourism and bringing global talent to the UK[2] and it is hoped that by 2023 creative industries will be worth £150bn and create 600,000 new jobs."[3]

Creative jobs are also expected to be future-proof, with 87% of creative jobs considered to be at low or no risk of automation, compared with 40% of jobs in the UK workforce as a whole[4].

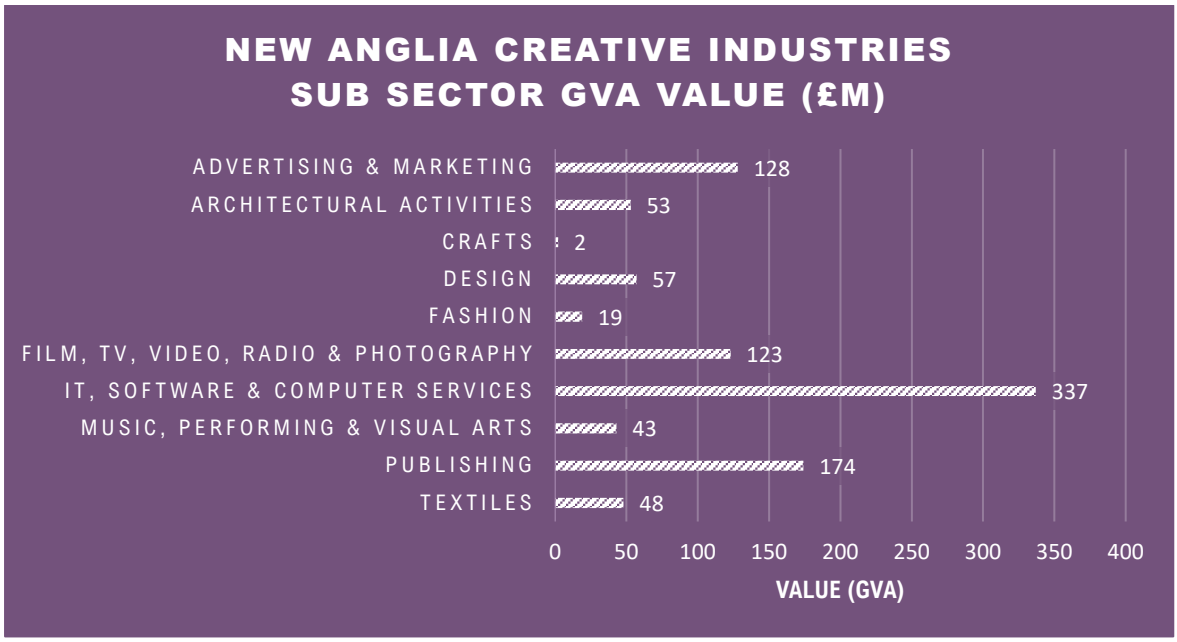


Figure 3

While the sector is diverse, comprising a number of key sub-sectors which are broken down into further specialisms, each makes a significant contribution to the UK economy[5].

Locally (Figure 3), the creative industries contributed £5bn GVA to the East of England economy in 2016[6] with Norwich ranked 14th in the UK's creative clusters (Figure 4) according to the Government's Industrial Strategy, Creative Industries Sector Deal.[7] Currently categorised as a high concentration cluster, it has been identified as having the potential to become a high concentration and high growth cluster.

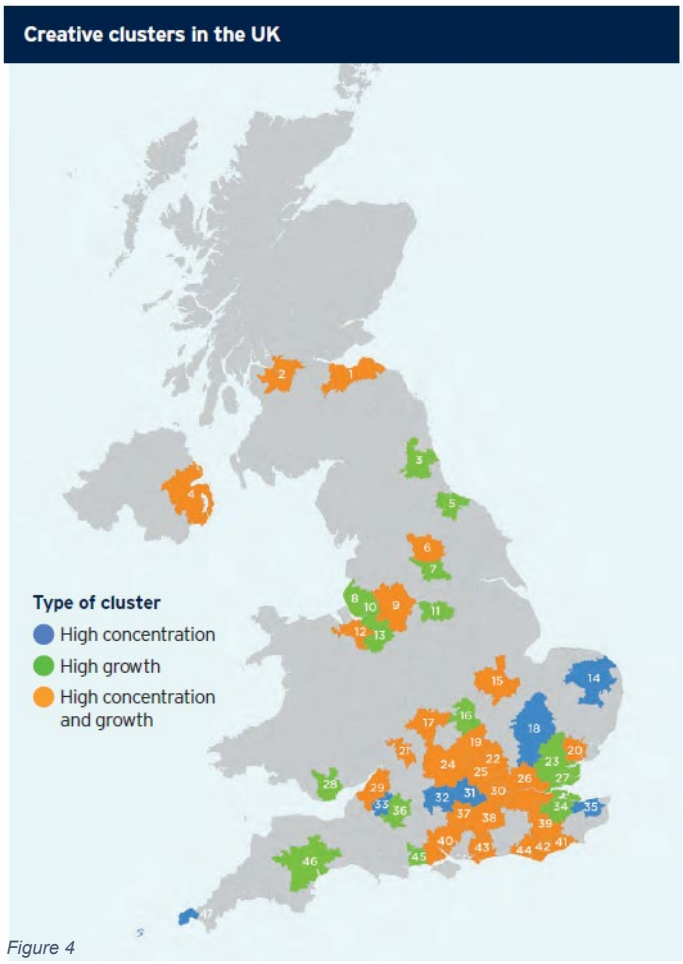


Figure 4

The East is recognised as being at the forefront of digital innovation and both Ipswich and Norwich are recognised as tech clusters in the Government's Tech Nation Report with the focus on Norwich's fast-growing digital creative hub and on Ipswich's world-leading centre of innovation in communications technology at BT Adastral Park, which is home to a cluster of 100 businesses. The ICT sector in New Anglia is worth £1.9bn with local ambitions to create 5,000 jobs and generate a further £650m GVA of economic growth and to be one of the UK's Top 5 tech clusters by 2020. [8]

Beyond these two major conurbations, the sector's businesses and jobs are relatively evenly distributed throughout the local authority areas (Figure 5) of New Anglia, providing a real opportunity for growth across the region – perhaps particularly engaging those rurally-located micro-businesses.

Employment Profile

Across the UK, the creative sector is comprised primarily of SMEs, mostly micro businesses and with many self-employed people working as freelancers.

Nationally, almost 90% of creative industry businesses (Figure 6) employ fewer than 5 people[9] and this figure is reflected in New Anglia, at 89.7%. This is a much higher percentage than in the economy as a whole, which is 78% nationally and 75.1% in New Anglia. Very few creative industry businesses in New Anglia employ 50 or more people, emphasising the important role played by smaller creative businesses in the sector. Nationally, 94.2% of those businesses operating in the arts have no employees at all, compared to 75.9% of businesses in the rest of the economy.[10]

As outlined above, different approaches to categorisation mean there are anomalies between national and local New Anglia data; for example, the national statistics do not include freelance workers, but recognising the importance of this group to the New Anglia economy, they have been identified and included in locally derived figures, as included here.

While there is potential to support businesses to scale up, the high numbers of smaller businesses present an opportunity for greater collaboration. Similarly, while the high numbers of freelancers are often working remotely or out of the area, predominantly in London, this presents an opportunity to create work opportunities in New Anglia for such freelancers.

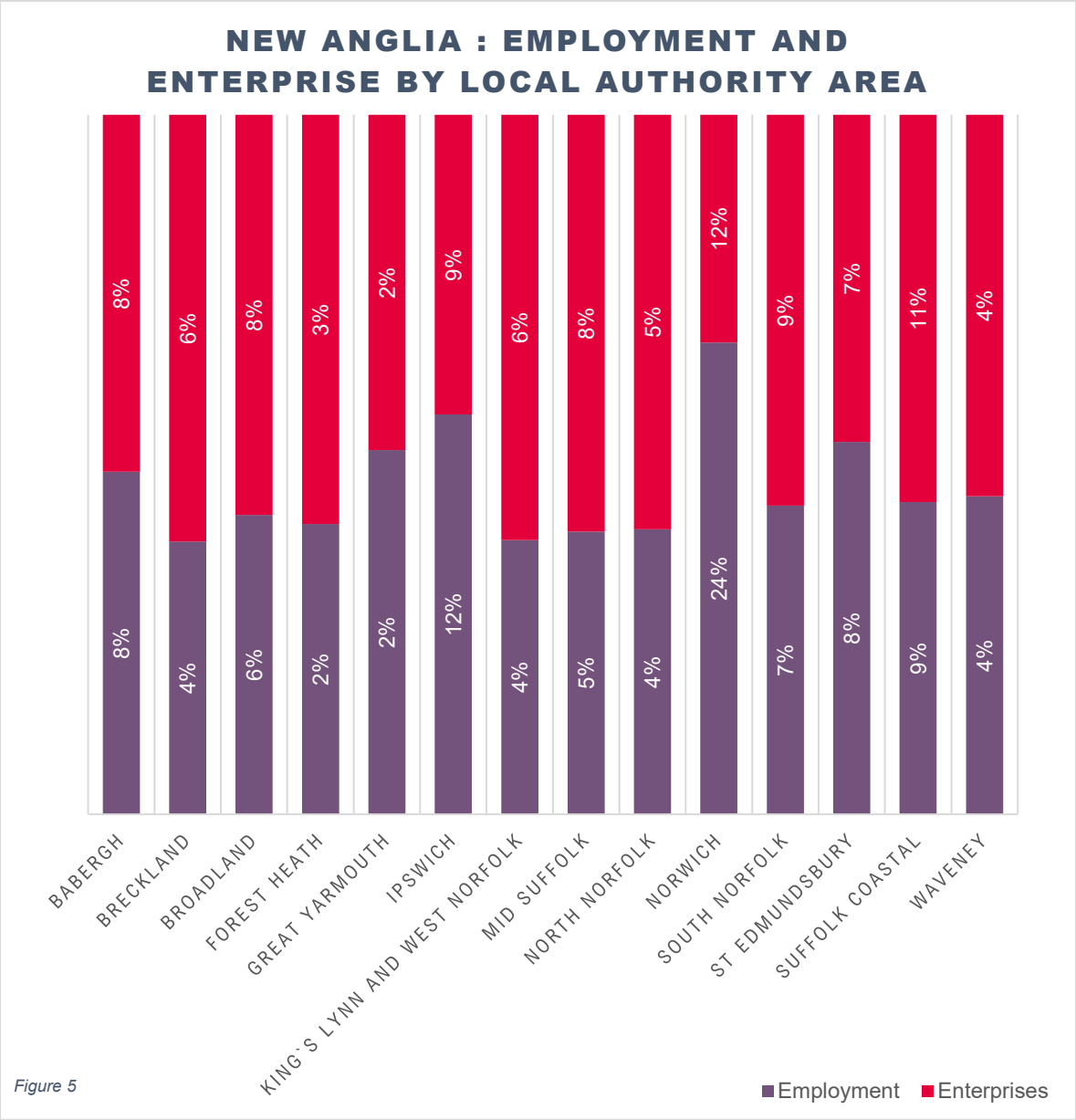


Figure 5

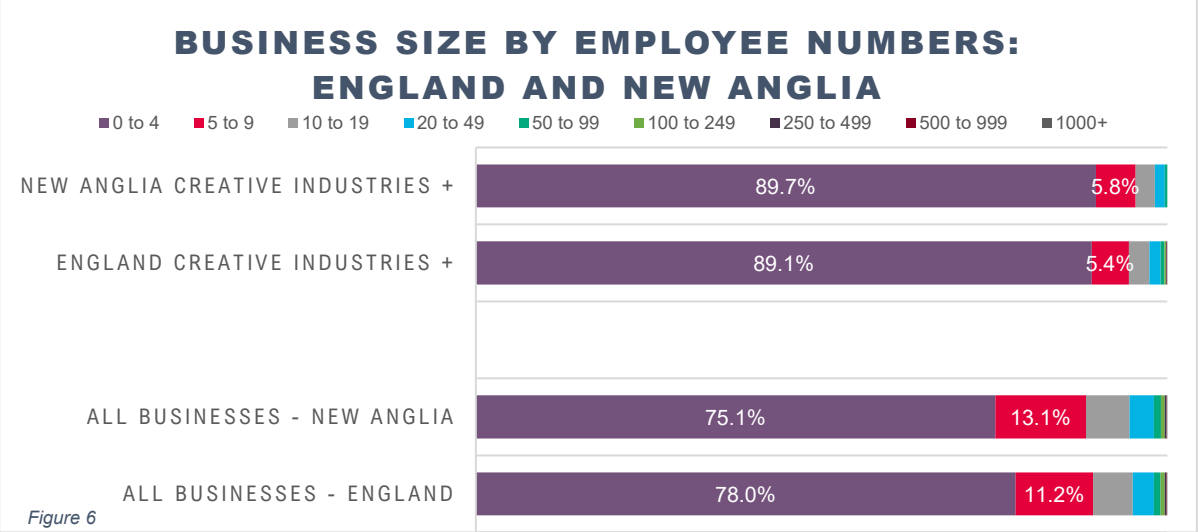


Figure 6

Looking at how New Anglia stands against its comparator LEP areas, the local profile (Figure 7) shows overall employment at around 15000 representing some 2.1% of overall employment in the area, and growth in the sector since 2009 demonstrates a consistent performance, in line with other areas. Currently the percentage engaged in the creative industry in New Anglia is lower than in most other comparator areas (Figure 8) shown, demonstrating an opportunity for future growth to achieve a greater percentage employed within the sector.

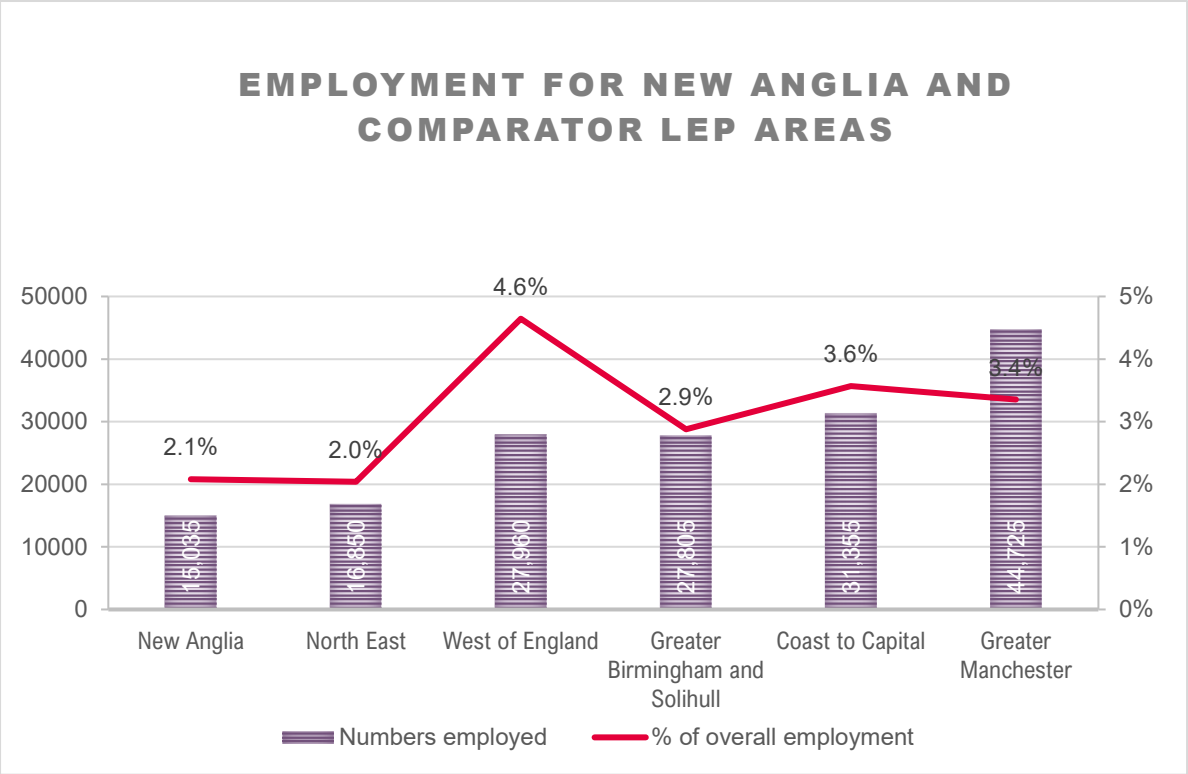


Figure 7

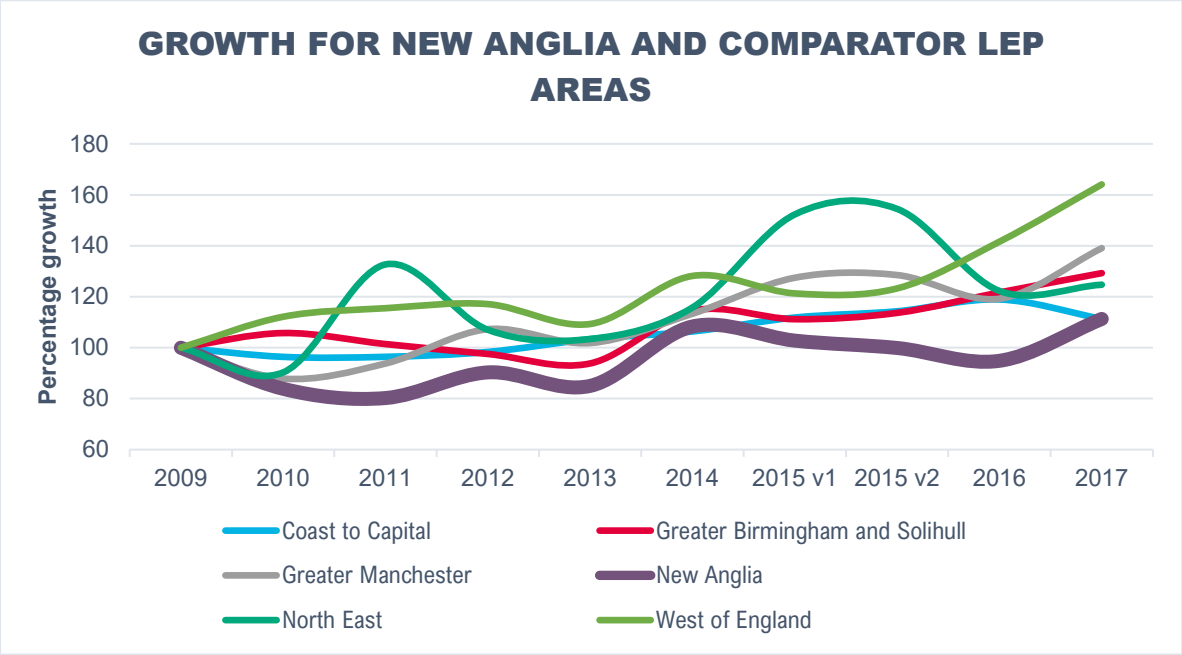


Figure 8

Sector strengths and cluster capabilities

Overview

The distribution of creative industry activity by sub-sector (Figure 9) across the UK is reflected in New Anglia, demonstrating a mature sector with broad potential.

New Anglia has a higher percentage of jobs in architecture, publishing, advertising & design, music & the performing arts and textiles, than nationally, and a slightly lower number of jobs in the film, TV & radio arena.

In line with the national picture, New Anglia's largest sub-sector is IT and software, including computer games, other software, computer programming and consultancy[11]. The region is at the forefront of digital innovation with strengths in cyber security, quantum technology, Internet of Things, UX design and fintech.

The stature of Norwich as a top-ranking creative cluster in the UK-wide leader-board and the recognised tech prowess of the city, together with Ipswich, reflects its strengths across:

- Digital Advertising & Marketing
- E-commerce & Marketplace
- App & Software Development
- Digital media and entertainment

Ipswich has strengths also in game design, software development and VR/AR. Across the rest of New Anglia there are a number of nationally influential sector employers.

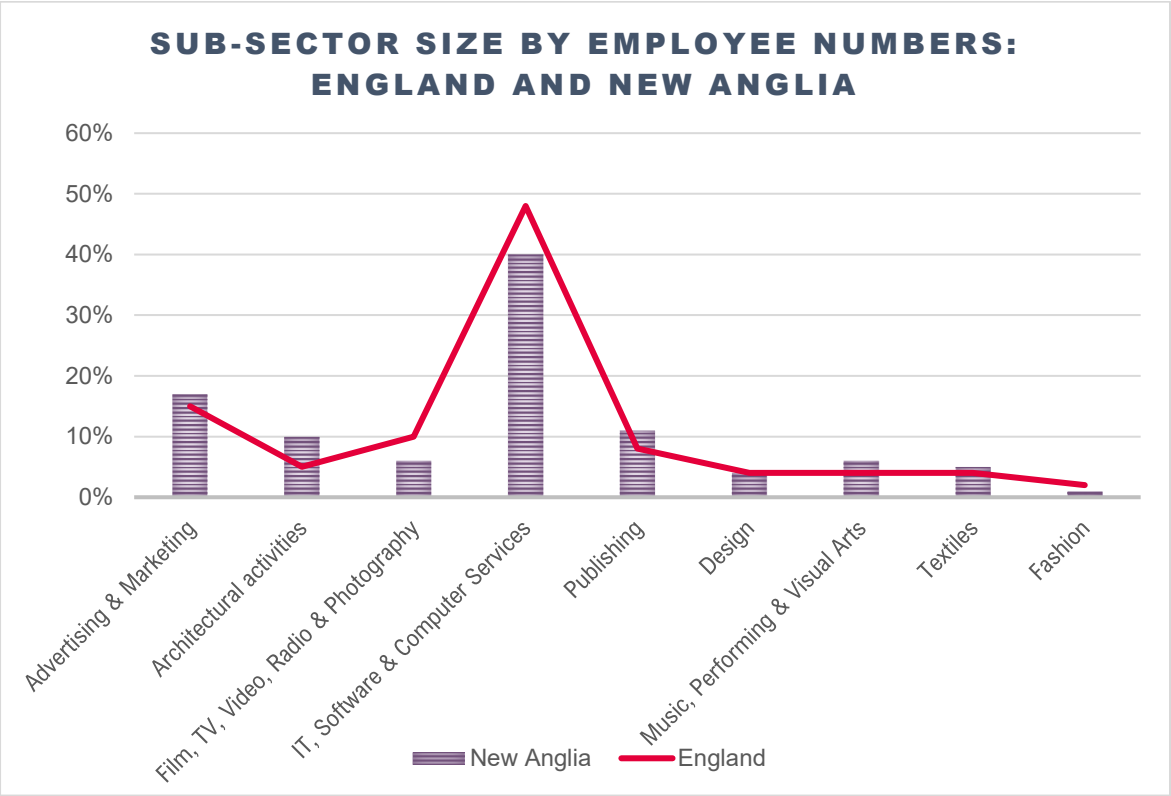


Figure 9

During the employer consultation process, there proved to be quite an imbalance in the level of engagement across the sub-sectors, which reflects the relative strengths of industry groupings and

routes to consultation within the sub-sectors. Hence, there was high engagement from the film and gaming elements but relatively low levels of engagement from areas such as fashion and textiles.

A more detailed profile of the sub-sectors, the skills issues faced by them, and where future potential lies, is covered in the later section: *The make-up of the New Anglia Creative Industries*.

The economic challenge for New Anglia

While the creative industries represent a growing, resilient sector with local assets and huge potential, the sector is fragmented and viewed as having a relatively low profile by many consultees. As shown in the labour market analysis from Burning Glass (see the table below) despite local sector resilience and growth, the demand for sector jobs has been lower across New Anglia than in comparator regions, which suggests there are opportunities to create jobs locally, which could help to retain home-grown talent.

BURNING GLASS : LABOUR MARKET ANALYSIS

RANK	WORK AREA	TOTAL JOB POSTINGS	JOB POSTINGS PER 1K EMPLOYED	LOCATION QUOTIENT	
1	London	330,619	77	↑	Much higher demand than average
2	Cambridge	19,536	53	↑	Higher demand than average
3	Bristol	20,207	47	↑	Higher demand than average
6	Birmingham	31,676	43	→	Average demand
13	Manchester	41,266	34	→	Average demand
14	Brighton	5,642	32	→	Average demand
41	**Ipswich**	**2,987**	**18**	↓	**Much lower demand than average**
49	Newcastle	7,896	16	↓	Much lower demand than average
51	**Norwich**	**3,579**	**16**	↓	**Much lower demand than average**
66	Bury St Edmunds	956	14	↓	Much lower demand than average
130	King's Lynn	360	6	↓	Much lower demand than average
133	Lowestoft	269	5	↓	Much lower demand than average
135	Great Yarmouth	224	5	↓	Much lower demand than average
163	Thetford & Mildenhall	208	3	↓	Much lower demand than average
214	Cromer & Sheringham	21	1	↓	Much lower demand than average

A recognition of the importance of small creative business to the economy, and the opportunity to provide sector-based support for business start-up, sustainability and scale-up is vital. Traditionally, the focus has been upon Norwich and Ipswich, where employment and clustering predominate, (Figure 5) but creative industry businesses are relatively evenly located across the towns and rural areas of New Anglia. This demands a response that encompasses the bigger geographical picture, but reaching these smaller, often rural businesses can pose a challenge.

'A sector that is misunderstood with low visibility and profile locally'[1]

The region features outstanding facilities such as BentWaters Parks, the UK's largest film and TV production site set on 2500 acres; but technical skills in sectors such as film still need to be imported. Other skills shortages in the sector mean that local projects are often outsourced from London.

'We need more freelance stage management, lighting and sound technicians available'

The dynamics of the sector tend to feature project and short-term working, which can preclude traditional skills development solutions requiring longer term commitment, such as apprenticeships.

'We need a creative industries pipeline'

There is a need for better connectivity, not just within the sector, but also across the wider economy and there is a real opportunity to foster a collaborative culture across New Anglia. Critical to this is increased convergence within and beyond the sector demanding enterprising sub-sector groups.

'We need more collaborative working across both industries and education, as well as long term local support'

If New Anglia's creative industries are to realise their tremendous potential, the various sub-sectors of the creative industries have the opportunity to work together collaboratively, sharing common themes and good practice to resolve any barriers to growth and to make a greater contribution across the breadth of the New Anglia economy.

Realising potential

The economic picture outlined above demonstrates the tremendous potential of this sector. To achieve our ambition for a high performing and dynamic New Anglia Creative Industries sector, where innovative businesses and skilled individuals can thrive, demands a strategic approach focused on identified skills needs and targeted action and intervention.

MADE IN NEW ANGLIA

VFX artist Stuart Craig, OBE : Oscar winner for his work on the Harry Potter series

Sculptor Anthony Gormley : based in Suffolk

Phil Carter : prominent graphic designer and owner of Carter Studio

Keith Chapman : founder of Chapman Entertainment and creator of Bob the Builder

Graphic Artist Brian Bolland : creator of Judge Dredd

Suffolk-based film producer Adam Tandy : creator of The Detectorists

Ember Films : contributors of film content for Planet Earth II

Sophia George : Games BAFTA Winner and first Games Designer in Residence at the V&A

Major games festivals : Norwich Gaming Festival and Game Anglia in Ipswich

'It's frustrating as both Norfolk and Suffolk have great potential'

Our response to the evidence base collected through this project is outlined in the next section, covering our planned approach to sector skills leadership through local career progression pathways, collective skills leadership, and smooth transitions to work.

'We need a more joined up approach to enhancing opportunity sharing and collective understanding of who offers what'

[1] Comments included in this document as styled here are taken from feedback given during the New Anglia employer sample consultation

The make-up of the New Anglia Creative Industries

	Reported employment and skills challenge			Local Priorities relating to the Sector Skills Plan
ADVERTISING & MARKETING	**GVA £128m**	**Jobs 2,875**	**Self Employed 439**	
	In March 2018, Marketing Week revealed the results of a survey of 8,405 UK students aged 18-24 with 51% saying marketing was 'never' or 'hardly ever' mentioned at their school with just 3% believing marketing offers a real career opportunity."[12]			Stakeholders raised: **Intervention 1** – representing and championing the sector to potential new entrants **Intervention 2** – Identifying new apprenticeship pathways
ARCHITECTURE	**GVA £53m**	**Jobs 1,750**	**Self Employed 186**	
	"International architects make up 1 in 4 of the UK architecture workforce, and without them the £4.8 billion contribution the sector makes to the economy would be in jeopardy… It is not simply about numbers though – our sector thrives on diversity, benefitting from different ways of working, backgrounds and experience." RIBA Chief Executive Alan Vallance [13]			Stakeholders raised: Priority 1 – Attracting great talent to study and work in New Anglia Priority 2 – Strengthening partnerships between local education and business **Intervention 2** – identifying new apprenticeship pathways
CRAFTS	**GVA £2m**	**Jobs 25***	**Self Employed 13***	
	Growth predicted in artisanal employment, such as barbering, brewing, textiles and ceramics (including some crafts occupations) incorporating elements of craft-based technical skill which are higher-end, and more expensive, than in the past.[14]			Stakeholders raised: Leadership Foundation The need to engage this sector locally to support CI-wide sector and skills leadership *These figures relate to reported employment data and it is acknowledged that the sector has substantially more people involved – often on an informal, second job basis
DESIGN	**GVA £57m**	**Jobs 600**	**Self Employed 880**	
	Design Council has put the design skills shortage partly down to the Government's focus on STEM (science, technology, engineering and maths), and the resulting drop in students taking up design, technology and art subjects throughout education, from GCSE through to A-Level and university. Design Council has put forward recommendations to reduce the skills gap, which include shifting the focus from STEM to STEAMD (science, technology, engineering, arts, maths and design).[15]			Stakeholders raised: Priority 2 - Support for new entrants regarding employer expectations of technical and creative business skills **Intervention 3** – Pilot of a CI business/work experience hub

FASHION

GVA £19m | **Jobs 125*** | **Self Employed 74***

"As the apparel industry begins to recognise and implement digitalisation as a way of delivering on speed, customisation and transparency, it is revealing gaps in the specialized skills set of its workforce,"Janice Wang, CEO of Alvanon[16]

Stakeholders raised:
Leadership Foundation The need to engage this sector locally to support CI-wide sector and skills leadership
*These figures relate to reported data and it is acknowledged that the sector probably has significantly more people involved

FILM, TV, RADIO

GVA £123m | **Jobs 1,030** | **Self Employed 636**

UK VFX film industry is almost entirely in London (98%).[17] It employs more than 10,000 people and is the fastest growing part of the UK film industry, predicted to grow 14% by 2022.[18] 30% of visual effects designers from EU.[19]

Priority 1 – A more diverse sector workforce in New Anglia / a clear sector route map / boosting work experience opportunities
Priority 2 - Support for new entrants regarding employer expectations of technical and creative business skills
Priority 3 – More small/micro businesses growing and benefitting from skills investment and job growth

IT, SOFTWARE

GVA £337m | **Jobs 6,825** | **Self Employed 1,043**

Across the UK, employer demand is outstripping supply of digital tech skills.[20] UK needs 134,000 new tech specialists every year[21] In the New Anglia the Digital Tech skills plan identified, a recruitment gap of 7,000 by 2024.[22]
The pace of change challenges teachers and lecturers who may be unaware of how digital skills are being applied in the workplace."[23]

The digital workforce lacks diversity, particularly in relation to gender.[24]

Priority 2 - Support for new entrants regarding employer expectations of technical and creative business skills

Intervention 2 – Identifying new apprenticeship pathways
Intervention 3 - Pilot of a CI sector work experience hub
Intervention 4 – Developing a Graduate Academy
Intervention 5 - Appraising the feasibility of a local Creative CPD Hub

MUSIC, PERFORMING ARTS

GVA £43m | **Jobs 1,000** | **Self Employed 734**

A lack of diversity, with those studying theatre, more likely to be white and educated privately.[25]
A focus in education on 'performance roles' rather than the business side of the industry.[26]

Stakeholders raised a local shortage of sound production specialists

Priority 1 – A more diverse sector workforce in New Anglia

Intervention 1 – representing and championing the sector to potential new entrants

This area is directly led through the Cultural Sector Skills Plan by the New Anglia Culture Board

PUBLISHING

GVA £174m | **Jobs 1,815** | **Self Employed 1,701**

In publishing, 9.5% of the workforce in 2015 was from Europe, while 4% was made up on non-European talent.[27]

Stakeholders raised:
Leadership Foundation The need to engage this sector locally to support CI-wide sector and skills leadership

TEXTILES	**GVA** £48m	**Jobs** 835	**Self Employed** 181
	The textile industry is worth around £9bn to the UK economy, and generating year-on-year growth. According to government predictions, the sector could generate somewhere in the region of 15,000 new jobs by 2020, largely being driven by sourcing fabrics and apparel from the UK becoming ever more attractive, in terms of quality and competitive costs. However, the growth is at risk of being undermined by a significant skill shortage; an issue which urgently needs to be addressed if the nation is to repatriate and capitalise on future demands[28]	Stakeholders raised: Leadership Foundation The need to engage this sector locally to support CI-wide sector and skills leadership	
TOTAL	**GVA** £984m	**Jobs** 16,880	**Self Employed** 5,875

All figures relate to New Anglia. GVA, 2015; Jobs and Self Employed, 2018

Creative talent demand and supply

The skills perspective for the sector

The economic picture shows that creative industries are the fastest growing part of the UK economy and are recognised as having huge potential. Despite this, learning in creative subjects has fallen over recent years and employers say that candidates are lacking core skills. Education and skills support needs to be more closely aligned with today's employment models and the workforce of the future, both nationally and regionally.

This section reviews the existing New Anglia talent pipeline and how that supply meets the needs of sector employers, to identify the strategic structural skills issues that need to be addressed to support future development and achieve ambitions for the sector.

This draws on the national and local evidence base and the employer consultation and stakeholder interviews conducted during the development of this skills plan.

Developing a skills strategy for success

Skills provision

Educational assets in New Anglia are highly valued, and the area has strong and specialist university provision, such as the renowned creative provision at UEA, Norwich University of the Arts and the University of Suffolk. Employers also recognised the educational strengths of Further Education provision and emerging opportunities such as the potential for a local Institute of Technology and the forthcoming T Level pilots such as the sector pilot led by Suffolk New College.

'A real strength in nationally and globally recognised educational provision'

However, employers believe there are misconceptions about the sector and its unique characteristics, career dynamics and the opportunities offered. They point to a gap across careers education, parents and teachers, in articulating the unique career offer of the creative industries.

'It's very difficult for young people to picture the jobs'

Alongside, concerns were expressed among employers over the decline of creative subjects being taught in school, and that sector skills – creative and computer science – were insufficiently covered in education generally.

'The decline in creative subjects in school is a real problem'

Concern was expressed also over the shortage of industry-experienced, technically qualified teachers in schools and FE, suggesting an opportunity for education-business collaboration to ensure up-to-the-minute industry awareness amongst teachers.

'We need a better understanding about creative career pathways within education

T Levels were broadly welcomed, although there were collective concerns about how to ensure that the demanding work experience requirements could be met locally in a sector primarily composed of very small businesses.

Frustration was expressed over the slow pace of apprenticeship reform and the availability of new standards. Apprenticeships are not currently a significant part of the talent pipeline which tends to be based on graduate entry. As outlined below, low demand from employers also makes the viability of developing and sustaining new local provision a real challenge for local learning providers

'Career entry is a bit like the wild west – who you know – this excludes great talent'

Gaps in provision identified in employer feedback included management and operational skills for small businesses, improved collaborations and peer working between industry and higher education. There was also support for innovation start-up hubs for the sector, particularly for games and film developers.

THE SKILLS GAP

68%

of New Anglia employers in our sample reported a significant gap between the skills base of their current workforce and their business needs

Skills Base

Feedback from employers in New Anglia identified skills shortages and a lack of diversity in the workforce, with the new entrants' pool often viewed as not being job-ready and lacking in technical or creative business skillsets. Employers also highlight the importance of fusion skills incorporating both creative and data science knowledge.

Skills shortages are especially reported at Level 4 and above for specific job roles such as VX, animator, programmer and post-production, with such shortages reportedly exacerbated by the Brexit process.

'An acknowledged shortage of craft skills – such as editors and sound specialists'

The fast pace of technological change makes it vital that the existing workforce is kept up to date and upskilled, but there is a gap in structured CPD locally. There is also a need to provide specialist sector support for creative industry start-ups and to support high potential micro-businesses in scaling up.

There is a reported lack of fit between national skills funding models and a sector characterised by flexible, project-based employment and resourcing through freelancers. As shown here (Figure 10), 29% of New Anglia's creative industry is self-employed, compared with just 14% of the whole workforce, which has implications for long term learning and connectivity with others in the sector.

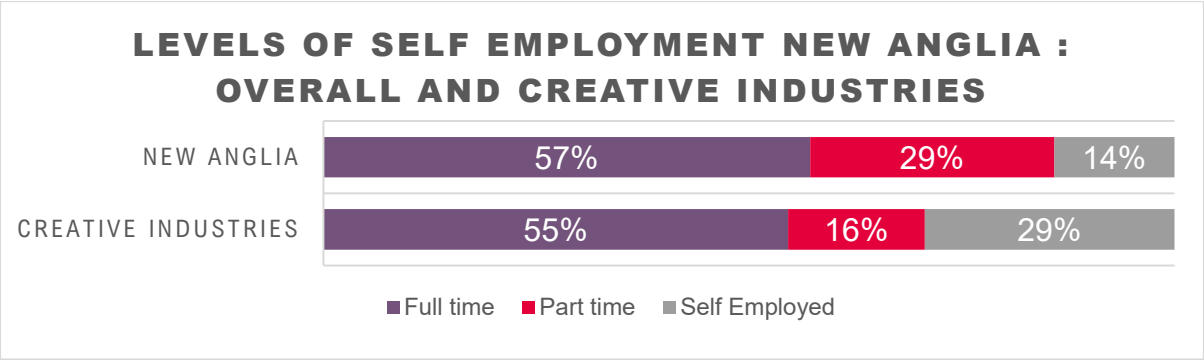


Figure 10

'Freelancers need to be able to network with like-minded businesses and access short courses in areas such as IP, contracts, and pricing'

As shown, the distribution of self-employment across the sub-sectors (Figure 11) is concentrated in broadcast and video, publishing and design, while architecture, IT, advertising & marketing have relatively low levels of self-employment.

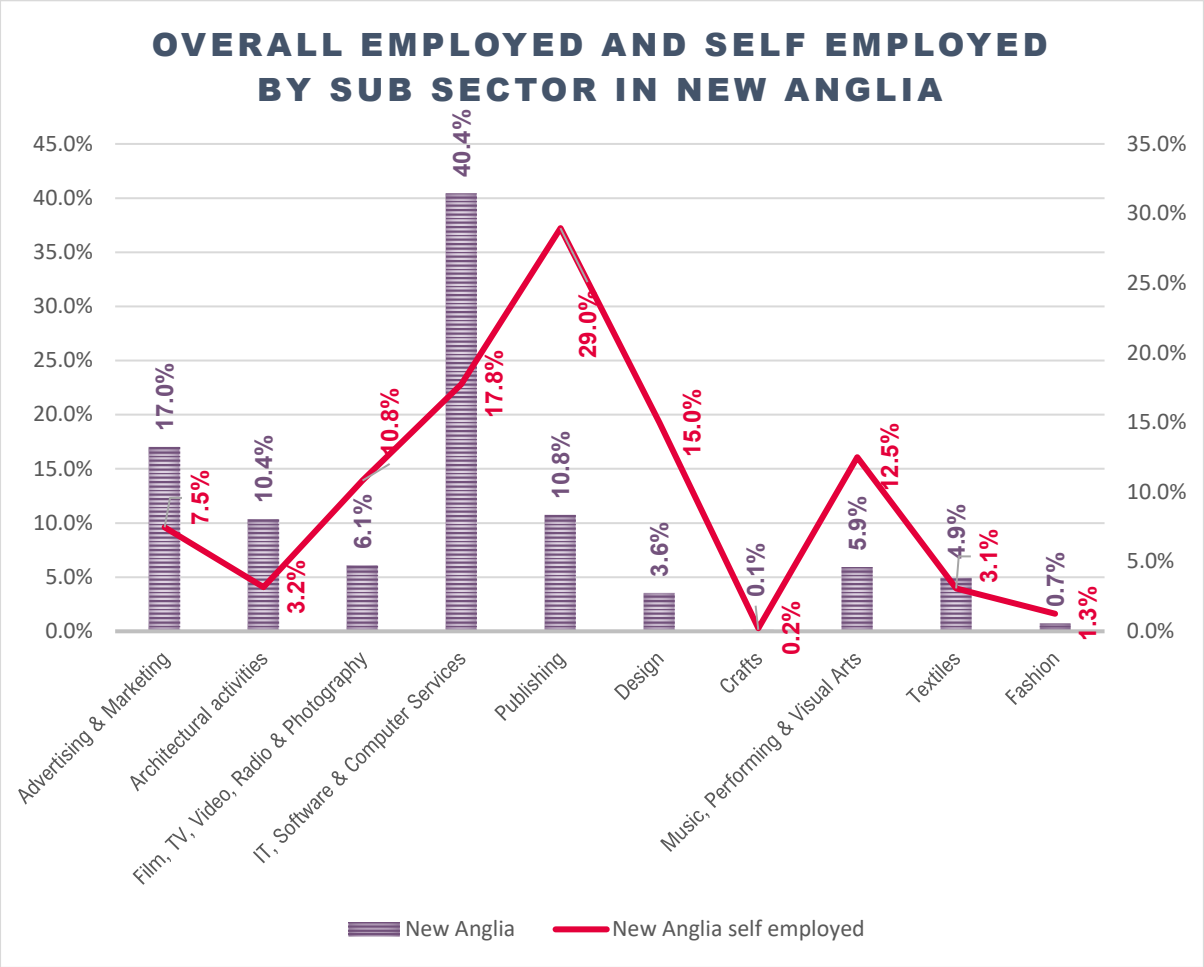


Figure 11

Apprentices

The sector's focus on graduate entry workers is reflected in very low take-up of apprenticeships and many sub-sectors are virtually unrepresented, as demonstrated in the following table. This confirms that apprentices are not a major feature in the creative industries talent pipeline and indeed only 55% of employers sampled ranked apprenticeships as important to the sector. Other factors were raised by stakeholders as barriers to apprenticeship development, including the very slow progress with the introduction of new sector-specific standards; the challenges of achieving viable cohorts in sparsely populated rural areas; and the predominance of very small businesses that are historically less likely to hire an apprentice. There may be the potential as degree and post-degree apprenticeships become more available for small business leaders / senior managers to upskill, either in leadership or higher professional skills, with an employer contribution post April 2019 of only 5% of total costs.

NUMBERS OF APPRENTICESHIPS IN NEW ANGLIA 2011 - 2018

APPRENTICESHIP FRAMEWORK	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Broadcasting Technology							
Community Arts		5	5	5			
Creative and Digital Media		10	5	5	10		
Cultural and Heritage Venue Operation							
Design	5	5					
Digital Learning Design							
Fashion and Textiles							
Furniture, Furnishing and Interiors Manuf.					10	10	
Glass Industry					30	60	30
IT Application Specialist	165	120	60	65	70	30	20
IT, Software, Web & Telecoms Professional	100	120	120	170	180	130	170
Jewellery, Silversmithing and Allied Trades							
Journalism			5	5			
Live Events and Promotion	5			5			
Marketing	15	25	25	15	20	20	10
Photo Imaging							
Public Relations							
Social Media and Digital Marketing			5	35	50	40	20
Technical Theatre, Lighting, Sound & Stage							
TOTAL	**290**	**285**	**225**	**305**	**370**	**290**	**250**

Diversity

Replicating the national trends, the local workforce is characterised by a lack of diversity and is primarily comprised of non-white, male candidates from middle-class backgrounds.

'A key challenge in Norfolk / Suffolk is the diversity mix - it tends to be very white and middle class with few people from a lower socio-economic background'

However, Further Education provides an opportunity to encourage a more diverse sector entry in future, with increasing demand reported for those FE courses that provide a route into the sector in areas such as Gaming and Media.

'The key problem is the transition into work – from quite generalist studies into jobs which require more specialist skills'

Business skills

Data collected on New Anglia skills demand through the Burning Glass analytics software showed that employers valued more generic *creative business* skills, showing that attention to detail, project management or communication skills were equally important as technical sector-specific creative skills, as shown in the following tables.

'Teach young people to think - too much of the curriculum lacks an emphasis on critical thinking'

Feedback from employers suggests that the current system may not tackle such needs sufficiently, with those surveyed recording business skills as the most prevalent skills gap, at 26%.

SPECIALISED AND BUSINESS SKILLS SOUGHT BY EMPLOYERS

Top ten specialised skills identified by Burning Glass in job postings for three example creative industry sub-sectors

ARCHITECTURAL OCCUPATIONS		PRODUCT, GRAPHIC & FASHION DESIGN OCCUPATIONS		IT, SOFTWARE AND COMPUTER SERVICES OCCUPATIONS	
Skills	**Postings**	**Skills**	**Postings**	**Skills**	**Postings**
AutoCAD	891	Graphic Design	720	SQL	11,762
Revit	445	Adobe Photoshop	631	Microsoft C#	11,070
Project Management	290	Adobe Indesign	501	JavaScript	11,005
Landscape Architecture	251	Adobe Acrobat	341	.NET	9,947
SketchUp	239	Adobe Illustrator	328	Software Development	8,912
Adobe Photoshop	189	Adobe Creative Suite	326	Web Development	7,785
Budgeting	168	Web Site Design	206	Active Server Pages (ASP)	6,693
Scheduling	165	Digital Design	197	ASP.NET	6,120
Project Architecture	161	Teamwork/Collaboration	187	SQL Server	5,976
Adobe Indesign	126	Sales	186	jQuery	5,724

Top five creative business skills identified by Burning Glass across all creative industry sub-sectors

TOP FIVE CREATIVE BUSINESS SKILLS
Communication Skills
Creativity
Detail-Orientated
Organisational Skills
Planning

Talent development

Development

The majority of those working in the sector are educated to degree level, reflected in the minimum education standard (Figure 12) stipulated in job advertisements, and those surveyed said that undergraduate internees and recent graduate employees (Figure 13) were most important to sector development.

However, employers indicate that not all roles require a degree, suggesting some people are over-skilled for the jobs they are doing. This offers scope to increase entry at different skills levels which could achieve greater diversity in the workforce together with local social mobility. Such opportunities could be supported by focused careers education, to open-up ambition and expectations.

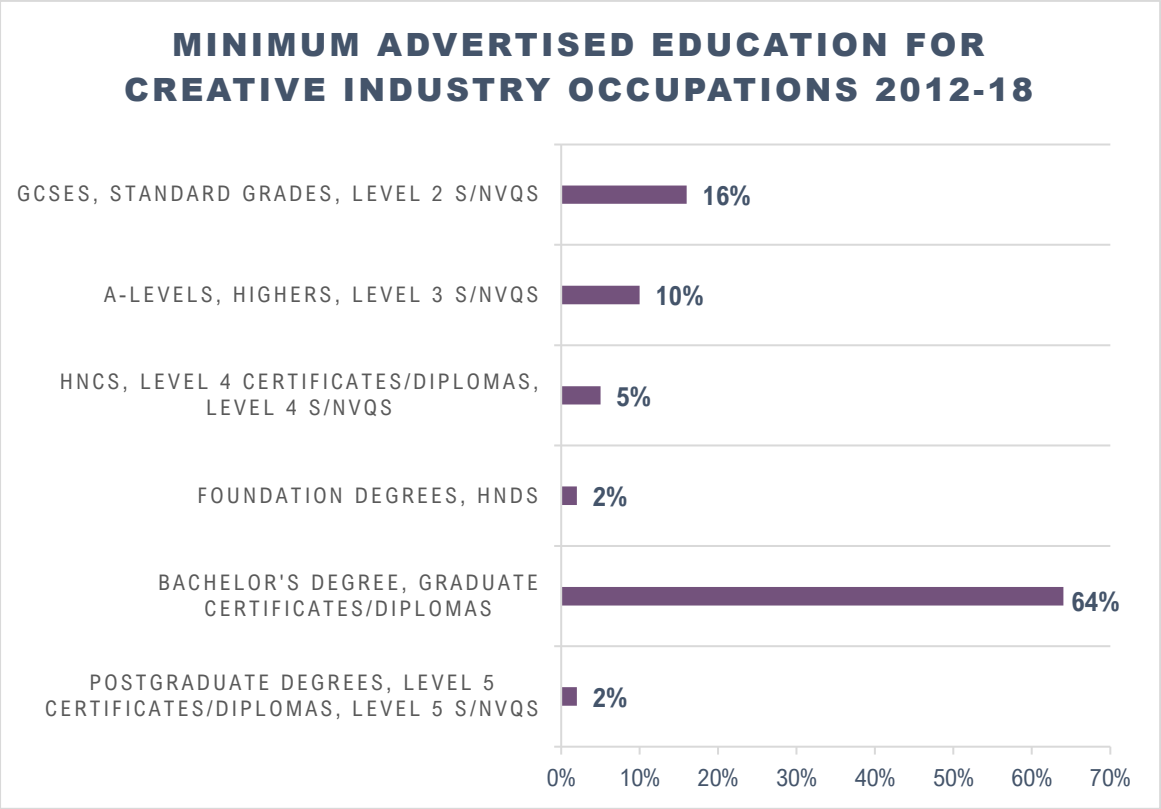


Figure 12

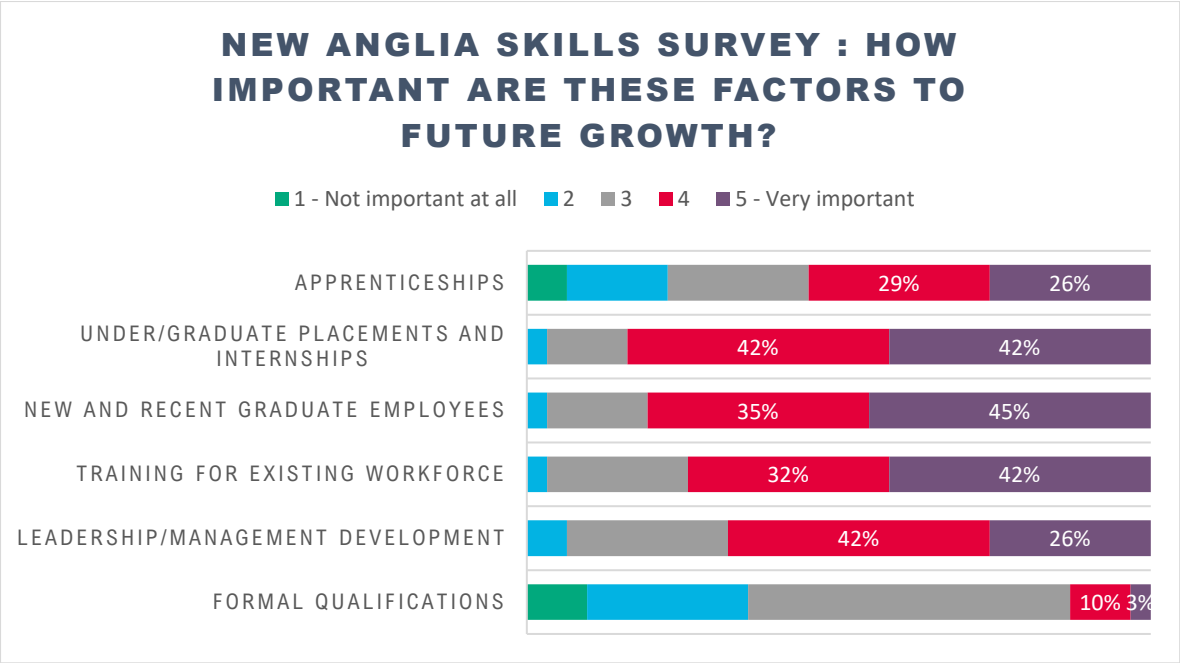


Figure 13

Retention

THE SKILLS DRAIN

80%

of New Anglia employers in our sample reported new and recent graduate employees as important to future growth, but there are concerns that high calibre entrants are being lost to London

Concerns about the loss of potential high calibre new entrants to London are prevalent.

Many local graduates are not staying (Figure 14) and there are felt to be insufficient local jobs or anchor employers in some parts of the sector, for example gaming. Additionally, employers emphasised the importance of creative internships and some challenges about matching demand with supply.

'We're currently educating and training for other areas – especially London and the South East'

With talent leaving the area (Figure 15) to take up jobs elsewhere, particularly in London, there is an opportunity for the local area to derive greater benefit from the learning within the region if such talent can be retained.

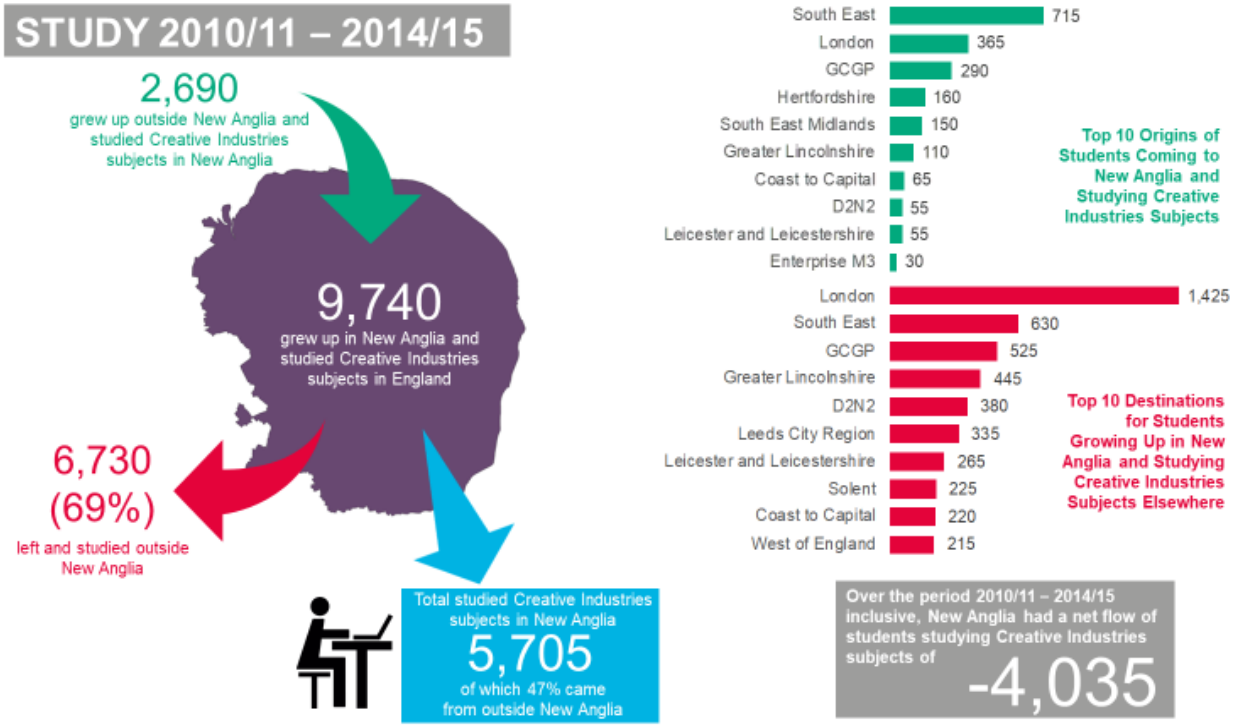


Figure 14

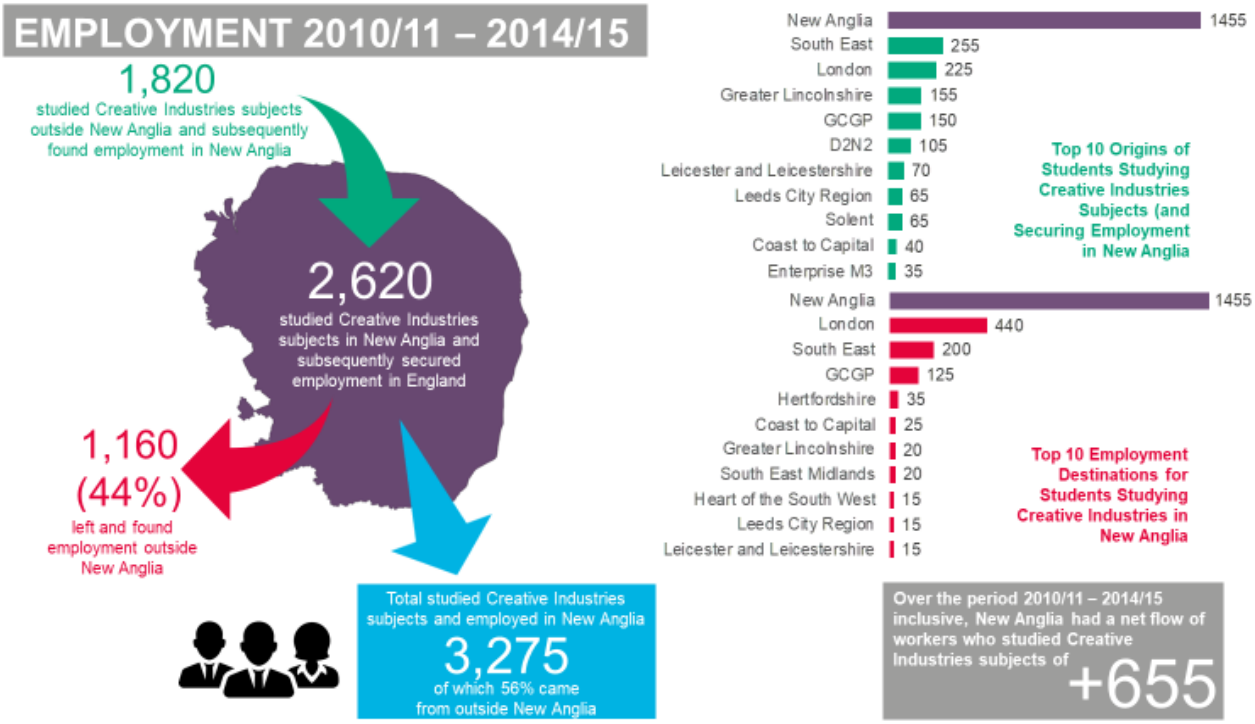


Figure 15

Summing up the strategic skills challenge for New Anglia:

The Skills Plan

Three priorities founded on collective leadership

Our ambition is for a dynamic New Anglia Creative Industries sector that is high performing, inclusive and contributing across the New Anglia economy and beyond.
Our vision is an environment where creative businesses can thrive and innovate and where local people can make the most of their talents to build careers and explore entrepreneurial ambitions.
Our focus is to realise the tremendous growth potential of this sector through inspiring our future talent and ensuring smooth transitions to work, supporting local career progression.

Through collective skills leadership, our initial focus will be on:

- Improving local career pathways
- Smoothing out transitions to work
- The lifelong learning of our cutting-edge local businesses and employees

Realising the full potential of people and business in New Anglia

Priority 1

Improving local career pathways

- A more diverse sector workforce in New Anglia
- A clear sector route map demonstrating a greater diversity of routes into the sector
- Identifying stronger apprenticeship pathways
- Boosting work experience opportunities – particularly with small / rurally-located businesses
- Attracting great talent to study and work in New Anglia

Priority 2

Smoothing out the transitions between education and local work opportunities

- A more diverse sector workforce in New Anglia
- Communications and support for new entrants regarding employer expectations of technical and creative business skills for new entrants
- Strengthening partnerships between local educators and local business
- Retaining creative talent in New Anglia

Priority 3

Supporting the upskilling of cutting-edge local businesses and employees

- More small / micro businesses growing and benefiting from skills investment
- Local CPD becoming a strength of the region
- Creative local alternatives to national funding 'fill the gap' for small businesses

Intervention 1	Intervention 2	Intervention 3	Intervention 4	Intervention 5
Representing and championing the sector to potential new entrants	Identifying new apprenticeship pathways	Pilot of a CI Sector business/work experience hub	Developing a CI Graduate Academy	Appraising the feasibility of a New Anglia Creative CPD Hub

INTERVENTION TIMELINE **Development Phase : June 2019 to May 2020**

Built upon a sector-wide collective skills leadership foundation

A new and influential collective skills voice for New Anglia Creative Industries, complementing existing interest groups and building new conduits to ensure a representative voice from across the sector

SKILLS VOICE TIMELINE **Foundation Phase : May 2019**

Priorities - drivers and outcomes

Priority 1

Improving local career pathways

Key Drivers

- Concerns that the sector characteristics, skillsets and job-availability are not understood by potential entrants, teachers, parents and advisors
- A desire to develop the diversity of new sector entrants particularly those with lower initial attainment levels, thereby tackling the national challenge of entry dominated by white, middle-class male graduates
- Apprenticeships are currently an insignificant contributor to the local talent pipeline
- Opportunities relating to impending 'T' Levels, although concerns about the meeting the greatly increased demand for work experience

Outcomes

- A more diverse sector workforce in New Anglia
- A clear sector route map demonstrating a greater diversity of routes into the sector
- An increase in Apprenticeship opportunities – especially at entry levels
- Significant increase in work experience opportunities – particularly with small and / or rurally-located businesses

Priority 2

Smoothing out the transitions between education and local work opportunities

- Employer concerns about specific technical skills gaps in potential new entrants
- Employer concerns about the broader 'Creative Business' skills required in new entrants
- Challenges arranging work experience and internships with the micro business (and freelance) community that is key important to this sector in New Anglia
- Concerns about the 'creative bleed' of local learners to London and the South East

- A more diverse sector workforce in New Anglia
- Communications and skills support for new entrants regarding technical and Creative Business skills expectations
- Enhanced creative use of technologies such as VR/AR/ER to prepare people for work

Priority 3

Supporting the upskilling of cutting-edge local businesses and employees

- The sector is especially reliant on micro-businesses and freelancers
- The economy needs more micro-businesses to 'scale up' and/or form competitive local collaborations creating local jobs or enhancing productivity
- Fast emerging technological developments require upskilling within the existing workforce and small business community
- National skills funding models such as Apprenticeships, EU funded approaches do not always adapt to the needs of the smallest businesses
- The opportunity to integrate business collaboration and skills development – as a way of supporting cross-area business inclusion

- Significantly more small / micro businesses growing, collaborating and benefiting from skills investment
- Local CPD becoming a strength of the region
- Creative local alternatives to national funding models 'fill the gap' for small businesses

Sector-wide collective skills leadership

Key Drivers

- The lack of a clear CI-sector wide 'sector voice' for skills and economic development
- The lack of a sector skills oversight for the whole region
- The opportunity to include key elements of the sector not actively engaged I
- The longer-term opportunity to evolve a broad sector development strategy that would be underpinned by skills development and investment
- The opportunity to connect better across the sector and raise its current low profile across the local economy and beyond

Outcomes

- Sector wide collective skills leadership - A new influential collective skills voice for New Anglia Creative Industries that complements the strong existing sub sector groups such as those active around Film and Digital

Interventions - actions and success indicators

Intervention 1	Intervention 2	Intervention 3	Intervention 4	Intervention 5
Representing and championing the sector to potential new entrants	Identifying new apprenticeship pathways	Pilot of a CI Sector business/work experience hub	Developing a CI Graduate Academy	Appraising the feasibility of a New Anglia Creative CPD Hub

Built upon a sector-wide collective skills leadership foundation
A new and influential collective skills voice for New Anglia Creative Industries, complementing existing interest groups and building new conduits to ensure a representative voice from across the sector

Intervention	Action	Success indicator
1 Representing and championing the sector to potential new entrants	1. Position the New Anglia Creative Industries sector in relation to the range of Careers/IAG support available and set priorities for change / improvement – particularly in relation to clearer sector 'route-map' for those considering a CI career 2. Clarify and articulate what the sector means by *employability* and the *creative business and technical skills* required by the sector 3. Evaluate the benefits of an annual high profile *Creative Industries Careers Day*, showcasing the sector and local opportunities 4. Ensure that representative, inspiring information is available for Careers Advisors, Providers, Parents and Learners to help them appreciate the unique characteristics, challenges and opportunities on offer within the sector locally and nationally	Supporting local business growth through a strengthened local creative talent pipeline with route maps for local people who understand, and are inspired by, the CI sector
2 Identifying new apprenticeship pathways	1. Identify a small number of Apprenticeship standards best-suited to promote local job entry below degree level - architecture and marketing were suggested 2. Identify provider partnerships that are in a position to increase sector apprenticeship participation 3. Identify how local providers can collaborate to deliver a robust, sustainable, local apprenticeship offer 4. Support businesses and local providers to promote local job entry at all levels through apprenticeships, including upskilling for the existing workforce	A clarified local CI Apprenticeship offer with targeted development, through partnership, in a number of occupational areas
3 Pilot of a CI Sector business/work experience hub	1. Investigate the feasibility of a Sector Creative Skills Hub, perhaps initially located in an FE College, supporting young people to gain high quality business-led work experience in partnership with local CI businesses. 2. Consider the fit and feasibility of funding models and policy initiatives in respect of: •Further Education	Increased, high quality CI work experience opportunities available for local young people through engaging with small, often rural-based, businesses and also utilising innovative virtual reality (VR) technologies

	•Traineeships and Apprenticeships (ATAs) •Forthcoming T-Levels •Business innovation and incubation (including virtual) 3. Consider how the creative application of technologies, including VR/AR/ER could support the quality of work experience and the engagement (particularly) of rural small enterprises	
4 **Developing a CI Graduate Academy**	The development of a sector Graduate Academy to support recent graduates gain professional career opportunities in the New Anglia area – both in the sector and also across the wider New Anglia economy. This programme could include: • Targeting sector and non-sector employers with the potential to recruit local CI talent • Providing immersive learning and work experiences in sector and non-sector work-contexts through innovative use of Virtual Reality • Offering a sector-based Internship scheme • Support Creative business skillset development alongside technical skills learned in the workplace	An added value regional resource to support new and recent graduates make a smooth transition to local jobs and local businesses can source the creative talent required for business growth
5 **Appraising the feasibility of a New Anglia Creative CPD Hub**	1. Investigate the feasibility and financial sustainability of a CI professional and enterprise development facility for New Anglia 2. Confirm the local business appetite to get involved, including preparedness to contribute through purchase of training places, as trainers, educators and participants	Accessible professional, technical, leadership and enterprise development making a real difference to the growth and productivity of the sector and having an impact across the whole economy by including CI professionals working in other sectors
Sector-wide collective skills leadership	1. Review, consult and agree an updated Terms of Reference for the New Anglia Creative Industries Group 2. Review the constituency of the current group to ensure representation from across both counties, including rural areas and conurbations, and using technology to maximise participation and minimise unnecessary travel • Review the constituency of the current group to ensure representation from each key element of the sector. This includes: o Architecture o Fashion o Advertising and marketing 3. Ensure working partnerships with parts of the CI sector which already have skills leadership arrangements in place 4. Consider the opportunity to contribute to a broader local CI sector development strategy that would be underpinned by skills	Sector wide collective skills leadership - A new influential collective skills voice for New Anglia Creative Industries that complements and adds value to the existing important groups

Timeline

Foundation phase : May 2019
Develop sector-wide Collective Skills Leadership

Development phase : June 2019 to May 2020
Progress the Three Priorities through development and implementation of the Five Interventions

DataPack

A comprehensive DataPack is available on request, cataloguing the extensive data analysis undertaken in developing this plan.

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