



**Building
the creative
workforce of
the future**

**A NEW
DIRECTION**

We create opportunity

Contents



Image: Emilie Dubois

Foreword	1
Executive Summary	2
Introduction	8
Chapter I	9
The UK and London's position as a Creative Economy	9
The value of creative and tech industries to the economy	9
The value of diversity to businesses	10
The current state of diversity in the creative and tech industries	10
The potential impact of Brexit	12
The importance of government policy to accelerate growth	14
Urgent issues to be addressed	16
Case Study: Generating local growth in New York	17
Recommendations	18

Chapter 2	19
London's Creative Landscape	19
The creative industries are the new heavy industries	19
Growth amidst a backdrop of rising inequality	20
The importance of social capital to securing work in the creative industries	20
The cost of living	22
Pay: Does it get any better?	22
The importance of parental support	24
Careers advice: Are young people getting the information they need?	25
Diversity and the quality of cultural output	26
Urgent issues to be addressed	28
Recruitment practices need to change	28
It's too expensive to work in the creative industries	28
Poor links between creative industries and young people	28
Perception of the creative industries and quality of cultural output	28
Case Studies	29
Easing the financial pressure on young creatives: Toronto	29
Actions speak louder: BFI diversity standards	29
Changing business culture: Sky	29
Recommendations	30
Chapter 3	32
Developing the Workforce of the Future	32
Developing talent in a changing world	32
The future of jobs	34
The future of jobs in the creative industries	38
Creating growth mindsets	39
Higher Education: What is its purpose?	41
Urgent issues to be addressed	42
Automation is inevitable	42
Higher Education: An outdated model?	42
Case Studies: A different approach to person development	43
School 21	43
South Korean exam-free semester	44
Flipside training programme	44
MAMA Youth Project	44
Recommendations	45
Conclusion	46
Figures	47
Endnotes	48



Image: Francis Augusto

Foreword

London has a strong claim to being the most creative city in the world. Its arts, heritage and open attitude towards different cultures are all key to the city's appeal and to most Londoners' sense of what is special about our city. The commercial creative industries have made a home in London and are an increasingly growing percentage of the city's economy. So why does this narrative ring a bit hollow? For anyone who lives in London the reality is obvious to see; despite the immense excitement and creative vibe, it's a tough city to succeed in. Inequality is endemic, and the creative industries are no exception.

A New Direction commissioned this report out of a sense of frustration. It feels like we have been talking about issues of access, barriers to entry and exploitation in our sector for a long time, but not much has changed. In fact, it can feel like we are going backwards, with it becoming even harder for young people short of economic capital and social connections to get a foothold in the creative industries.

As this report shows, alongside the story of growth in the creative sector is a tale of rising living costs, hidden exploitation and a system struggling to keep up with technical and economic change. Our creative city does not truly exist if it is only a reality for a small part of the population.

A New Direction has run Create Jobs since 2011, working with industry partners to create bespoke training programmes that take talented young Londoners and connect them with the creative sector. Increasingly, we are working across the tech and digital spheres, where we see a growing understanding of the value that an inclusive workforce offers. But we have also seen initiatives and funding come and go and not enough progress made.

Our hope with this report is to bring as much of the available research together in one place in order to allow different stakeholders to engage with the issues from a new perspective. Hannah Casey, the report's author, has made several recommendations for collective action, which we would like to spark a broader debate about what needs to be done, by whom and when.

We cannot wait any longer for change to happen by itself. We need new, joined-up approaches that connect with the reality of people's lives, sharing the burden of responsibility across employers, funders and the education system as well as among communities and young people themselves. We are prepared to be in this for the long term to make sure that the change we effect is systemic and not piecemeal or more of the same.

We are optimistic that this is the moment. Young Londoners are the creative future of this city, and that means it is in good hands.

Holly Donagh

Deputy Chief Executive and Partnerships, A New Direction



Executive Summary

Building the Creative Workforce of the Future

"When the power of digital technology converged to give a much greater reach to [advertising, design, fashion and moving image media], that was the moment the creative economy was truly born". (British Council 2010).¹

We are living in the age of the creative economy. The creative industries are now worth more to the UK than oil, gas, life sciences, aeronautics and the automotive industries combined.² Technology is allowing new industries to flourish, and with them new types of occupations - such as VFX specialists, technical architects and technology evangelists - are developing. Yet whilst the creative economy continues to grow, many young people remain excluded from developing a creative career in London.³

This research identifies the main challenges that need to be overcome to ensure the potential of the creative economy is realised in a way that captures the ideas, mindsets and values of London's entire society. It makes recommendations for what needs to be done to ensure that London continues to be a genuinely vibrant and heterogeneous place, where everyone has the same chance of success.

Photo credit: Francis Augusto

The Main Challenges

The UK's creative economy is booming, but global competitors are keeping pace

The creative industries are incredibly valuable to the UK economy, contributing 5.5%⁴ of its total GVA, but they are also highly mobile, with many countries competing to house top businesses and talent. Presently, 31% of the UK's tech workforce hail from overseas, of whom 11% are from the EU.⁵ However, research suggests that the UK's position as the premier European hub for highly skilled tech workers has started to erode since the Brexit vote, with Germany and France (the UK's closest rivals) having increased their share of the workforce.⁶ Further research from the screen industries predicts falls in the number of EU workers living in the UK after Brexit.⁷ These predictions come at a time when leaders in the tech⁸ and screen industries⁹ greatest concern for their future is the availability of skilled workers, with half of start-up founders considering either moving their headquarters to the EU or setting up a European outpost.¹⁰

Irrespective of whether these trends continue, Brexit could serve as a catalyst to ensure that more young Londoners can access careers in the creative economy. It could present a unique opportunity to reposition London's creative industries as the hotspot for emerging talent. At a time when the creative industries are increasing in importance to our economy, inequality across London is growing, adversely affecting groups such as BAME communities and people with disabilities.¹¹ Transforming the creative industries to fully reflect London's heterogeneous society can therefore help to secure the creative industries' long-term future whilst simultaneously addressing inequality.

Recommendations

- Move from a location-first approach towards skills development to a centrally led, industry-first approach that can be scaled locally, recognising that all industries have specific skill requirements, networks to navigate and unique cultures. As these elements are inextricable from one another, they should be tackled holistically.
- Reduce the complexity. Creating one consistent point of contact between the creative industries and local communities (see full report for case study on New York) can help improve the efficiency, coordination and strategic growth of the creative industries. This approach should be considered in London, particularly for a sector dominated by SMEs and freelance workers.
- Develop a "Creative London" brand. London, a city that voted to remain in the Brexit referendum, now more than ever needs to redefine its identity, with creativity at its core. If executed sensitively, a brand such as "Creativity Works", which celebrates London's creative industries and its cultural output, will help to redefine the city in a post-Brexit era and help it to remain attractive to foreign investors, creative enterprises and workers.

Representation across the creative industries has not changed since the 1980s

Multiple research reports have proven that representation within the creative industries workforce has remained flat over the past thirty years, with people from middle-class backgrounds dominating most sectors.¹² Each industry has its unique challenges to contend with; for example, women are vastly underrepresented in tech, making up just 19%¹³ of the workforce, whereas museums have a female-dominated workforce. BAME communities suffer from underrepresentation in most industries, and people with disabilities are underrepresented across every sector and in all types of work.

Part of the problem is the narrow way in which employers recruit for roles, favouring academic qualifications and work experience above skills-based measurements.¹⁴ A pivotal factor, however, is the important role informal networks play in securing work in the creative industries.¹⁵ This is particularly significant considering that a high proportion of workers in the creative industries have little or no contact with people in lower-paid occupations.¹⁶ Interwoven into this is the expectation of many creative businesses, in sectors such as fashion or visual art, that young people complete unpaid work for long periods of time. In an industry where work experience is so highly valued when securing work, this prices many young people out of a creative career.

Having secured a job, in many cases, pay remains low for the entirety of a creative professional's career; 73% of musicians, artists and performers earn less than £20,000 per annum.¹⁷ In a city where the cost of living has meant that, in the last twenty years, working families have evolved from representing 28% of Londoners living below the poverty line to 58%,¹⁸ a creative career can be simply unaffordable for most young Londoners. It is hardly surprising, therefore, that across some communities parents are wary of their child embarking on a career in the creative industries, leading in part to lower participation on arts courses by young people from, for example, BAME backgrounds¹⁹, and ultimately furthering the creation of publicly funded culture that does not reflect the tastes, values or experiences of a broad section of society.

Recommendations

- Make financial support available to young creatives. As an ever-more-important part of our economy, supporting young creatives should be considered an investment in the future sustainability of the industry. Schemes that reduce housing and living costs help reduce the financial burden on young creative people and can be executed at a bigger scale than they currently are.
- Introduce London Living Wage. As a bare minimum, the London Living Wage should be paid for all entry-level roles across the sector, and this should be a commitment made by all creative businesses. Looking forward, all creative businesses should strive to offer rates of pay that allow people from different backgrounds to sustain long-term careers in the sector.
- Funders should be accountable. Aligning funding based on diversity standards ensures it is allocated in a way that more proportionately represents the diversity of the population. This will in turn ensure the realisation of projects that better reflect the cultural tastes and values of different parts of society.
- Companies need to understand the demographics they want to hire. The Sky case study (see full report for details) demonstrates how, by taking the time to understand different demographics, recruitment and retention practices can be adapted to help maximise the abilities and growth of different types of people.
- Coordinate careers advice. Careers advice should be strategically coordinated across sectors and schools to ensure all young people and their parents are made aware of the spectrum of opportunities open to them in the creative industries.

Adapting education for a creative future

Whilst the creative industries are increasing in their importance to the economy, there are concerns that the education system is not providing students with enough opportunities to develop their creativity. The current government's education strategy focuses on a siloed, subject-based approach to education that teaches "that common body of knowledge" that is the basis of all modern liberal democracies.²⁰ Simultaneously, a growing body of thinkers - not least Andreas Schleicher, the Director of the Directorate for Education and Skills at the OECD - are arguing that traditional teaching pedagogies are no longer fit for purpose, and that bodies of knowledge that 20 years ago could have lasted students their entire career will no longer endure in a fast-changing world where future jobs are hard to predict. These theories are underpinned by various research studies, notably from Nesta and Oxford Martin's "Future of work 2030", which demonstrates that the most important capabilities for the future will be abilities such as judgement and decision making, fluency of ideas and originality abilities.²¹ When we consider that creativity is defined as "imaginative activity fashioned so as to produce outcomes that are both original and of value",²² it is easy to understand why, according to a further study by Nesta, creativity is "the most significant predictor for an occupation's chance of growing as a percentage of the workforce by the year 2030".²³

As universities moved to a more silo-based approach to subject teaching²⁴ in the 20th century - and as the school system is, in many ways "a protracted system of university entrance"²⁵ - debates need to be had around how well universities are developing students' creativity and preparing them for work.

Particularly when, according to a recent study, just 23% of employers believe that university graduates have developed the necessary skills for the workplace.²⁶ Meanwhile, the success of employability programmes such as Flipside, Mama Youth, D&AD New Blood Academy and Commercial Street, amongst others, demonstrate that talented people are not only to be found in the libraries of some of our oldest institutions. Recruiting from different places will not only encourage more diversity in the workplace but also help force the debate around the role of Higher Education in society, either by causing institutions to adapt or through restructuring their role in society.

Recommendations

- Policy makers need to stop looking to the past for inspiration. As the work by Scharmer and Schleicher suggests, pedagogies that focus on learning from the past can no longer be expected to adequately prepare young people for the future world of work. We cannot continue to teach students the same information in the same way and expect different answers to the significant challenges facing the world.
- Schools should be encouraged to approach the curriculum with fresh eyes. As a growing body of evidence mounts surrounding the success of new pedagogies, so does the number of influential voices arguing for the substantiated need to nurture capabilities beyond knowledge in our young people.
- Working as a community, we can ensure all young people get the experience they need. Groups of cultural partners, schools and employers, along with public bodies, can jointly provide mentoring, advice, work experience and bespoke training schemes to ensure every child and young person gets the support they need to find the right path for them. This will take the burden off the education system to work in such a complex ecology on its own.
- Employers need to be more ambitious in who they recruit - and how. With many employers dissatisfied with the skills of university graduates, it is time for employers to broaden their outreach in regards to employment.

Conclusion

On the surface, debates surrounding how we educate young people may seem unrelated to discussions around diversity in the workplace and our collective culture. However, there is a core similarity between the two discussions: that in order to “do well”, the onus is on young people to adopt the norms of the pre-established elite, which they can only hope to change once they have climbed high enough.

There are clear parallels with this approach across the creative industries, in how public funding is spent and careers are accessed. In order to secure a job in the arts, you need to be connected to people in the industry, talk the same language and share similar values. This leaves many creative jobs fundamentally inaccessible to a great deal of young people and has created a culture that encourages exploitative and exclusive working practices that only the wealthy can afford to navigate. However, the alternative scenario, which would put the entire onus on policy makers and businesses to adapt their mindsets, presents its own challenges. It suggests that their carefully curated knowledge and experience is no longer as valued. The only way to change this is for the creative industries and young people to have much better exposure to each other, and to create a shared understanding of how each other operates.

There are examples of where this is being achieved. Programmes such as Mama Youth and Flipside prove that informal training programmes work and are valuable for both young people and creative businesses. Similarly, some of the Mayor’s strategies, such as the Creative Enterprise Zones, Careers Clusters and the Creative Land Trust, make attempts to improve pathways into the creative industries. However, what is missing, and desperately needed, is a more coordinated approach across both London and its industries that will achieve impact at a bigger scale.

To make a significant impact, we need policy makers, educators and creative businesses to develop a shared vision and sense of responsibility for the future growth of their industries. This means taking a long-term and systemic approach with a focus on inclusion as much as on growth. This will help to create sector-wide agreements on what is to be achieved, leading to rapid and more wide-reaching change.



Introduction

The world stands on the brink of a momentous change in the way in which people work. The huge technological advances of the 21st century have transformed the global economy's foundations from industrial capitalism to creative capitalism, reforming the working population into two distinct groups: "creative workers" (such as scientists, technologists, artists, media workers and knowledge-based professionals) and "service workers" (lower-skilled, lower-waged workers, working in industries such as healthcare support, food preparation and administrative positions).²⁷ As technology becomes increasingly pervasive, it is expected that the number of lower-skilled jobs will decrease and the number of roles for creative workers will grow. London, which accounts for over 40%²⁸ of the Gross Value Added from the UK's creative industries,²⁹ is well positioned as the third-largest (second outside the US) global technology hub.³⁰ It has a huge opportunity to benefit from the oncoming changes in work. However, its burgeoning creative and tech industries are under pressure. In a recent survey of UK tech companies, 55%³¹ of managerial staff cited access to skilled workers as their biggest challenge. In global surveys the UK consistently underperforms in the educational attainment of its population. This could exacerbate the skills shortage if, with the oncoming departure from the European Union, many highly skilled EU workers decide to leave the UK.

Simultaneously the creative economy still suffers from a chronic lack of representation, with each individual sector experiencing its own unique challenges. For example, only 19% of roles in the tech sector are fulfilled by women and 15% by people of BAME backgrounds³²; hugely under-representative of London society, where 43.1% of the population are BAME.³³ Conversely, women are over-represented in the museum sector, comprising 64.8% of the workforce.³⁴

Equally, socio-economic background, remains hugely influential to securing a role in the creative industries. The Panic! Report (2018) highlighted the ongoing endemic challenges that prevent people from working-class origin accessing careers in the creative industries, through a lack of connections or the need to undertake long periods of unpaid work in order to secure a full-time role, amongst other reasons.

Having a diverse workforce, cited as one of the key pillars of a creative economy,³⁵ is now recognised not as a "nice to have" but as positively influencing businesses prosperity.³⁶ At the same time, people from backgrounds currently most underrepresented in the creative economy are the most likely to suffer from the predicted reduction in jobs in the service industries, where they are overrepresented.³⁷ This creates an urgent moral and business imperative to ensure that London's heterogenous young population is prepared and able to access jobs in the creative economy of the future - a task made more challenging against a backdrop of austerity measures affecting schools and youth services, as well as increasing disparity between the rich and poor.³⁸

This report attempts to reposition the two challenges of a job market evolving faster than its workforce alongside the need to increase heterogeneity in the workplace. It will uncover the hidden issues faced by employers and young people when preparing for the future of work, and will assess what skills and access we should ensure our young people develop to be able to take full advantage of the future, creative economy.

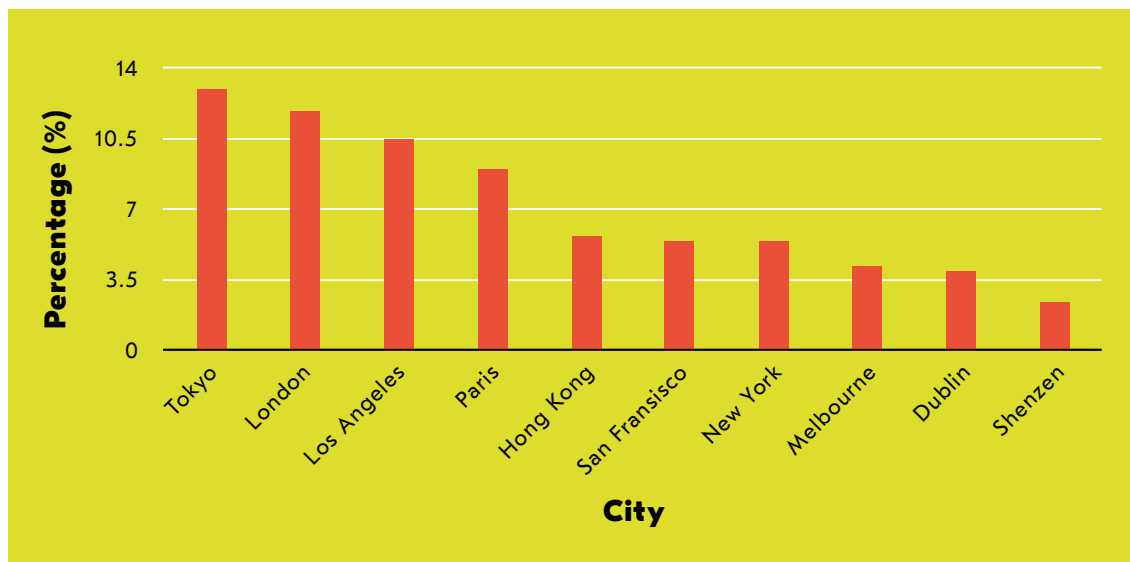
Chapter 1: The UK and London's position as a Creative Economy

The value of creative and tech industries to the economy

"When the power of digital technology converged to give a much greater reach to [advertising, design, fashion and moving image media], that was the moment the Creative Economy was truly born". (British Council 2010).³⁹

London and the UK have enjoyed excellent growth in their creative industries in recent years. Since 2010, the Gross Value Added (GVA) of the creative industries has grown by 34.6%, adding £101.5 billion to the British Economy, over 40%⁴⁰ of which is generated in London.⁴¹ They account for 5.5% of the UK's total GVA.⁴² The creative industries are, in short, our new 'heavy' industries; worth more than oil, gas, life sciences, automotive and aeronautics combined.⁴³ The growth of the creative industries is now forever linked to the digital tech sector which, in total, is worth more than £130 billion⁴⁴ to the UK economy. Worryingly, the creative and tech sectors are both inescapably important to the economy and highly mobile.⁴⁵ They are therefore not to be undervalued, particularly considering that, in the World Cities Culture Report 2018,⁴⁶ London had one of the highest percentages of creative employment.

Figure 1: The percentage of creative employment across global cities⁴⁷



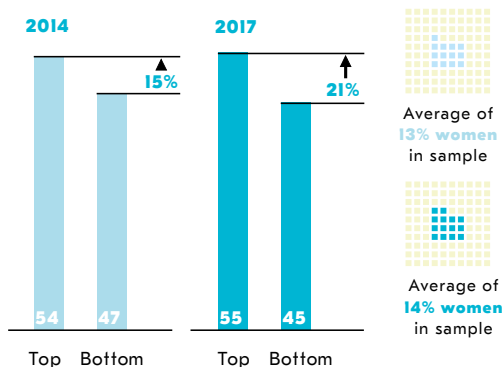
On the surface, the UK, with London at its epicentre, looks well positioned to compete globally. London was recently ranked as the second-largest technology hub outside of the US,⁴⁸ largely due to its proximity to other markets and levels of investment, both of which are highly dependent on our future relationship with the European Union. The "Global Creativity Index" conducted in 2015 ranked the UK 12th for creativity globally, with the top four spots going to other English-speaking nations: Australia, the United States, New Zealand and Canada.⁴⁹ However, it was noted in both studies that the UK is at its weakest in terms of its talent pool, underperforming comparative to its overall score. In the Creativity Index specifically, the UK ranked 33rd⁵⁰ in terms of the educational attainment of its population.

The value of diversity to businesses

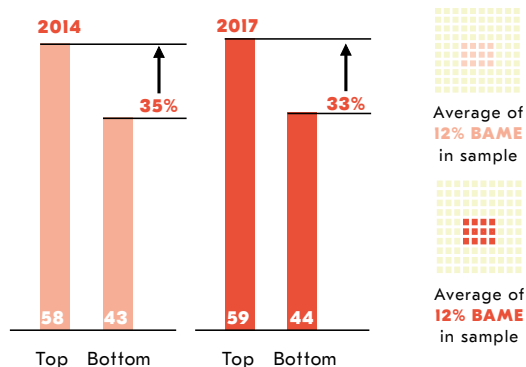
Beyond talent itself, the need for *diverse* talent is becoming increasingly widely recognised. Recent surveys by McKinsey, amongst others, have demonstrated the net benefit that a diverse workforce has on a company's fortunes.

Figure 2: The likelihood of a company's financial performance being above the median according to the predetermined characteristics of its executive staff⁵¹

Executive gender diversity by quartile



Executive ethnic diversity by quartile



Companies with higher numbers of ethnic minorities and female employees strongly correlate with higher profitability. Conversely, smaller SMEs, both in the UK and globally, struggle to balance diversity with the urgency to fill open positions. Often, talent managers in smaller companies have neither the capacity nor the luxury of considering the demography of the team they are building.

The current state of diversity in the creative and tech industries

The Tech Nation Report 2018 highlighted that access to skilled talent remains the primary concern of tech start-up leaders in 2018, with the cost of living and Brexit also ranking highly.⁵² Moreover, the sector has its own diversity challenges. For example, just 19% of the UK tech workforce is female versus 49% of the working population. 15% of the UK workforce are BAME, which is over-representative of the UK population at 11%; however, in London, 43% of the population are BAME.⁵³

“Most organizations, including McKinsey, must do more to take full advantage of the opportunity that diverse leadership teams represent.”⁵⁴ (McKinsey, 2015)

As the above statement shows, the need for diversity across the tech and creative industries is understood at a visceral level. However, the increase in demand for skilled workers in the sector makes the need to improve diversity equally as urgent in order to establish a long-term inclusive culture in the sector.

Furthermore, with the effects of Brexit still unknown, the creative industries are in real danger of losing skilled workers and businesses who want access to European markets, putting more pressure on the workforce.

In the UK's creative industries more specifically, the hard facts show that diversity has not improved in the past thirty years.⁵⁵ The number of people employed in the creative industries from working-class backgrounds has dropped in real terms and remained proportionately static. Today, just 13% of people working in the creative industries are from a working-class background, compared to 22%⁵⁶ of the total working population. People from upper-middle-class backgrounds, by contrast, fulfil 33% of roles whilst representing just 16% of the population⁵⁷. The stats on representation for people from BAME backgrounds are even more stark. Just 4.2%⁵⁸ of UK workers in film, TV and radio are from BAME backgrounds, when 11% of the UK's and 43.1%³² of London's population are BAME. Further research by Diamond, the creative diversity network for the screen industries, demonstrates how composite diversity challenges can be; for example, BAME communities are over-represented in on-screen roles across TV but under-represented behind the camera.⁵⁹

Equally, people with disabilities remain largely excluded from the creative industries. Whilst 18% of the working-age population can be defined as disabled according to the Equality Act definition, just 9.6%⁶⁰ of those in employment are disabled. As the below table shows, the number of disabled people working across the cultural sector is below even that.

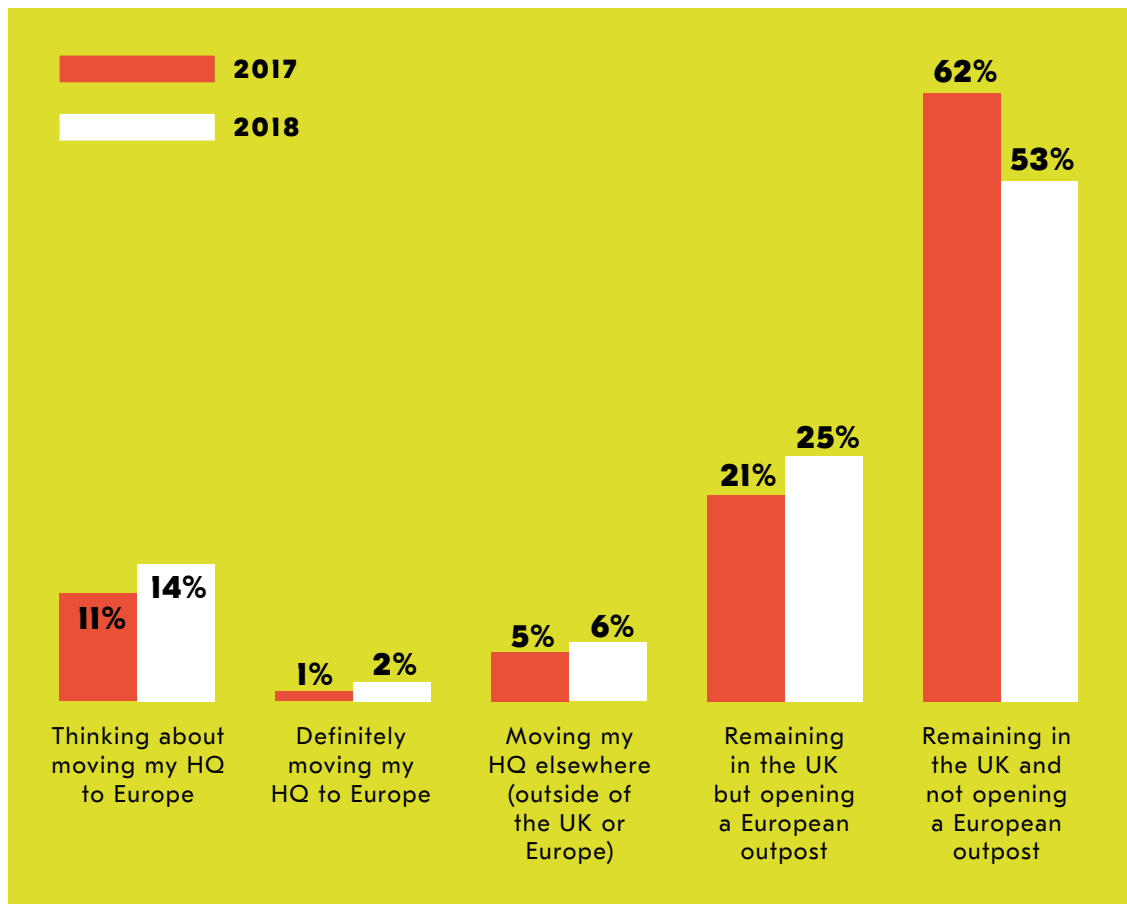
Figure 3: The percentage of disabled people working across the arts⁶¹

	Artistic Staff	Managers	Other Staff	Specialist Staff	Volunteers	All Staff
Combined Arts	3.8%	3.6%	2.8%	5.1%	2.7%	3.2%
Dance	10.8%	10.5%	5.1%	5.6%	1.7%	8.0%
Literature	2.4%	13.7%	5.7%	3.4%	6.2%	4.0%
Museums	0%	3.0%	2.8%	1.9%	2.6%	2.6%
Music	0.6%	2.7%	4.1%	1.5%	8.4%	1.8%
Not artform specific	0%	3.1%	5.7%	4.2%	8.3%	4.7%
Theatre	4.7%	7.7%	3.4%	4.5%	5.3%	4.2%
Visual Arts	1.0%	3.8%	2.8%	2.4%	2.4%	2.3%
Grand Total	3.2%	5.2%	3.3%	3.8%	3.7%	3.4%

The potential impact of Brexit

Research by the Recruitment and Employment Confederation estimates that, across the tech sector, 20% of all jobs are fulfilled by EU nationals⁶² whose eligibility and desire to work in the UK remains unclear should the UK leave the EU. What we do know, however, is that leaders in the tech sector are younger, metropolitan and educated to a higher level than average - a demographic that overwhelmingly voted to remain and are likely to position their businesses to ensure they retain close ties to Europe. Moreover, tech businesses are dominated by SMEs with the agility to relocate with relative ease. To date, over a quarter of UK start-ups have confirmed they are setting up a European outpost in order to retain access to the European workforce and their markets.⁶³

Figure 4: Intentions of start-up founders following Brexit referendum⁶⁴



Nevertheless, the UK's tech industry still has a very strong position in Europe. A report by Orrick (2017 & 2018) highlighted that the UK was overwhelmingly the top destination for international tech workers, with 20.9% of the European workforce located in the UK in 2018. However, the gap between the UK and other European markets reduced between 2016 and 2018, with all top 10 countries increasing their share of the international talent pool except for the UK (down from 24.3% in 2016⁶⁵ to 20.9% in 2018⁶⁶). Moreover, in 2017, Germany overtook the UK in terms of the size of its professional developer population. This data suggests that, since the Brexit vote, the UK has started to lose its appeal to tech workers. It remains to be seen how much this trend could be exacerbated after the UK leaves the European Union.

Figure 5: Top destinations for international movers into the European tech ecosystem 2018⁶⁷

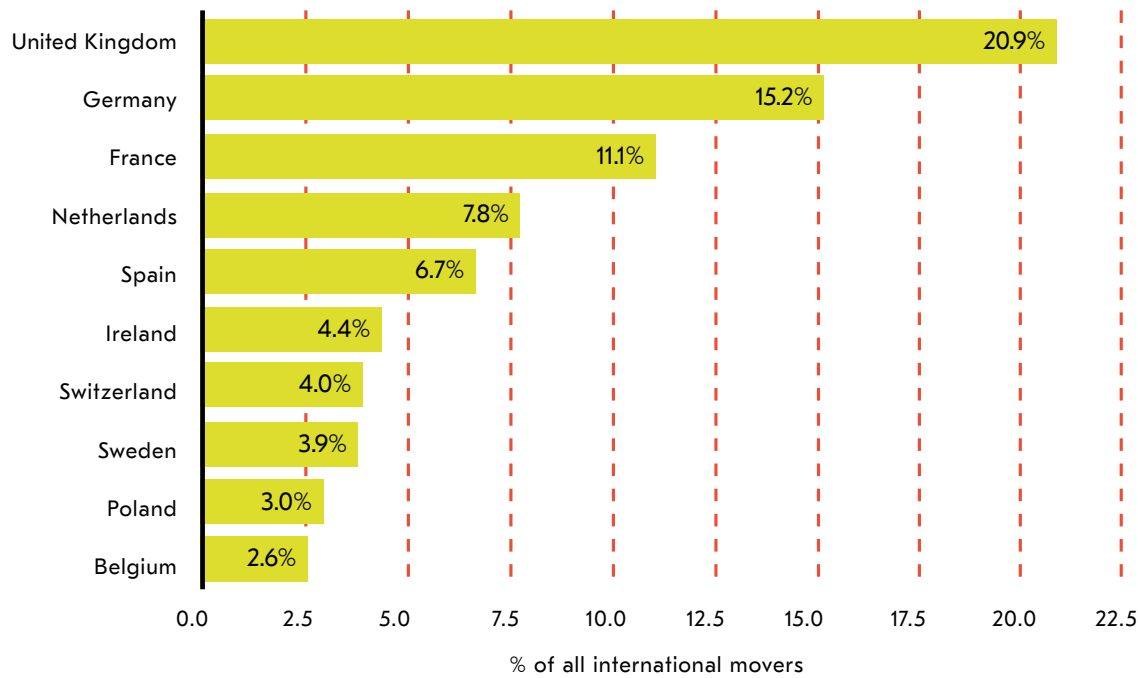
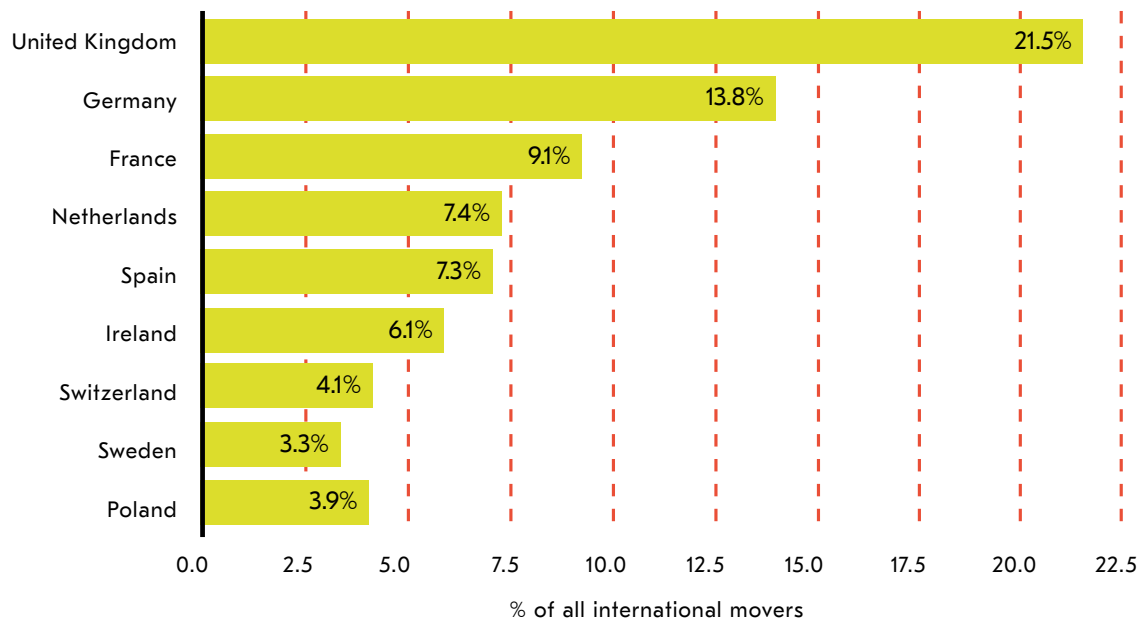


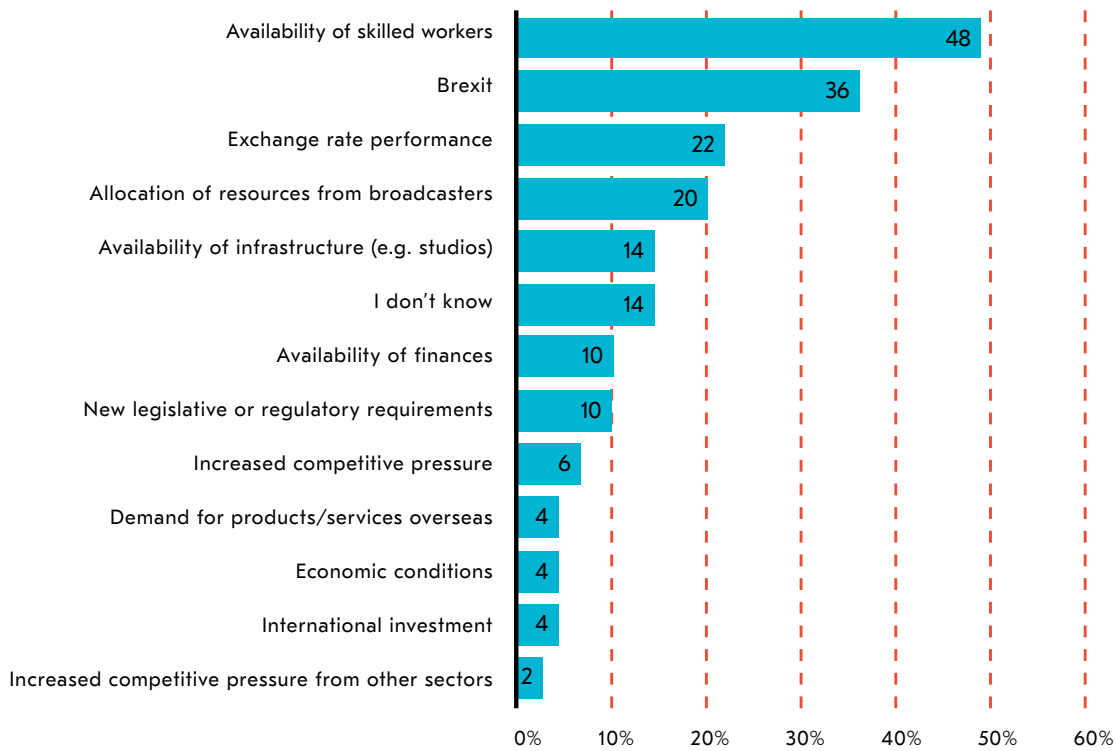
Figure 6: Top destinations for international movers into the European tech ecosystem 2017⁶⁸



The cultural sector is also likely to be impacted by Brexit. 4.6%⁶⁹ of its roles are performed by EU nationals, according to recent government figures, and some subsectors have a higher proportion of EU workers than others. For example, between 25-30%⁷⁰ of the VFX, animation and video-game workforce, which already faces a skills shortage after periods of accelerated growth, are from the EU. Considering the double-digit growth that video-gaming, in particular, has been experiencing in recent years, it is important that the UK remains attractive to this sector, especially whilst other markets take steps to ensure they are competitive.

France, for example, have developed the Support Fund for Videogames (FAJV) to offer subsidies to local companies that are creating content and want to protect their IP. In 2015 the FAJV supported 47 such projects with a total of €3.8 million.⁷¹

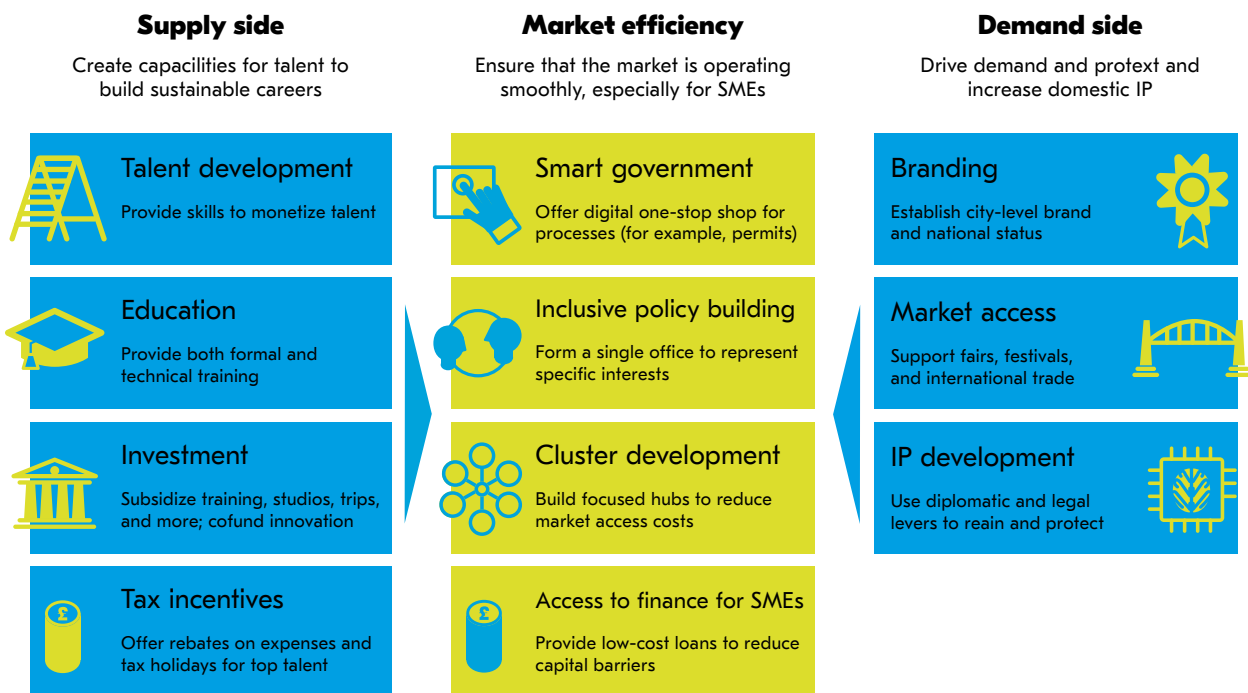
Figure 7: Primary concerns of those working in the screen industries (quarterly barometer)⁷²



The importance of government policy to accelerate growth

Post-Brexit, the UK's creative industries face the challenge of needing to retain and attract more international businesses and workers whilst up-skilling and training its current workforce. Research conducted by The Boston Consulting Group⁸⁰ highlighted several key levers of growth for the creative industries that governments can action.

Figure 8: Possible government interventions across the value chain⁷³



These are separated into three categories: supply-side interventions, market efficiency and demand-side interventions. The research argues that for government interventions to be successful they must cater to an individual industry's needs. For example, to grow a successful music industry, policy must enable musicians to monetize their talent and build long-term, stable careers. In Nashville, The Nashville Music Council of the United States created "Ryman lofts", which offer subsidised accommodation for emerging musicians, ensuring they can afford to live in the city long term. In addition, the City Music Council worked in partnership with industry-leading stakeholders to both expand existing local music businesses and attract new businesses to the area, such as music awards and festivals. This, combined with the use of the city's logo to attract tourism, has helped to develop the city as a global centre for music.⁷⁴

Looking at London, this report acknowledges the Mayor's Skills for Londoners Strategy (2018),⁷⁵ which outlines a strategic approach to improving the skills of London's workforce and a commitment to replacing finance from the European Social fund post-2020, which will help support the development of a talent pipeline for the creative industries. However, scepticism remains over whether the strategy can create the change needed to support the growth of the creative industries and ensure a strong pipeline of talent. For example, the strategy states that the "transformation cannot be achieved by City Hall alone. It can only be accomplished through strong local leadership and collaborations between employers and employability providers."⁷⁶ Whilst local leadership will no doubt be important, devolving skills training by geography alone makes it difficult to ensure the specific skill needs of individual industries are being met.

Furthermore, many of the proposed initiatives are either very much in the initial stages of development (for example, the proposed Creative Land Trust) or overly reliant on businesses taking the initiative to engage with education providers (for example, London Enterprise Adviser Networks). The challenges facing the creative industries are urgent and, as such, the response to these challenges needs to be agile and fit for purpose like the international examples mentioned. Creating industry-led strategic public/private partnerships that meet the needs of individual sectors will be vital to ensuring the long-term prosperity of London's creative businesses.

Urgent issues to be addressed

Research suggests that creative businesses are worried in the short term about recruiting sufficient talent to support their growth. This is being exacerbated by Brexit, which is predicted to lead to a reduction in the numbers of EU workers in London and the wider UK.

Despite the potential loss of EU workers and funding, there are opportunities that Brexit presents. A weaker pound, for example, could make the UK more attractive to itinerant industries such as film. Moreover, Brexit presents a huge opportunity for UK workers from under-represented backgrounds to access jobs in the creative and tech industries. This will require a strategic approach to how education, training and access to jobs are both delivered and funded, particularly when backing from the European Social Fund, which currently provides much-needed support to some of London's most impoverished communities, may no longer be accessible.

Much will depend on the policies put in place by the UK government post-Brexit to remain attractive to new businesses and international workers, and the rapidity with which they are put in place. More broadly, as both the tech and creative industries are highly mobile, it is important that London quickly creates the conditions that make it as easy as possible for the UK's creative and tech businesses to thrive. Whilst several initiatives are already in development, doubt remains as to whether these can meet the urgent needs of individual industries and whether they can be effective in time to make an impact.



Case Study: Generating local growth in New York

Under Mayor Michael Bloomberg (2002-2013), The New York Mayor's Office for Media and Entertainment (MOME) developed a strategic vision for the future of New York's film and TV industries. The office became a key component of a centrally led strategy across the city's government departments to rebuild and diversify its economy post-9/11. In the screen industries especially, New York was losing out to other world locations for film and TV productions, but particularly to Canada, which was offering attractive production tax credits.⁷⁷

As a result of the initiatives put in place by MOME, including large tax incentives for filming companies, the spending on film production increased by 70% between 2002 and 2012, up to \$7.1 billion. During this time the number of people working in film and television increased by 20%, up to 130,000 people.⁷⁸ Central to the Office's strategy for growth is supporting the development of skills, both of those already working in the industry and of young people looking to start their careers. Programmes are run in collaboration with creative businesses to help facilitate easy transitions to work for young people.

As MOME operates as an agency, it is well positioned to facilitate connections between creative New Yorkers and businesses in need of talented people. For example, the "MOME Finance Lab"⁷⁹ hosts an afternoon of networking and collaboration to help develop films made for, about and by women.⁸⁰ The event offers women the opportunity to pitch their project to a room full of funders, followed by a networking event. (A similar strategy has been adopted by the Sheffield Doc Fest in the UK, which offers documentary and non-fiction film makers from across the globe the opportunity to meet with over 300 international funders, broadcasters and distributors. Meetings are matched between pitchers and investors for both creative and financial discussions.⁸¹)

Another of MOME's successful initiatives has been the "Made in New York Production Assistant Training Programme". The objective of this programme is to provide unemployed and low-income New York City residents with training and placement into entry-level positions in film-production companies. The programmes run for five weeks and are free to participants. Each year approximately 80 people complete the course, and of these, 86% of graduates are placed in PA roles.⁸²

Part of the success of the MOME has been its understanding of the potential for the creative industries to create economic, social and cultural value. For example, the Production Assistant Programme was developed, in part, to provide additional resources that would attract production businesses to New York. This philosophy has also proven its value through the success of the "Made In NY" logo, which the Mayor's office offers to productions that are, as the name suggests, made in NY.⁸³ The brand was taken into the hearts and minds of the local population following its launch in 2005.⁸⁴ As part of the "Made in NY" programme the Mayor's office provides co-branded outdoor advertising space to promote productions made in the city. The advertising is provided for free by the Mayor's Office, on the basis that the production company will donate to a New York cultural institution of their choice. For projects with a production budget of over \$10 million, this is at a fixed rate of \$10,000. For a production budget of below this, the donation is based on 0.1% of the entire budget.⁸⁵

The effect of providing this advertising space is to demonstrate to New Yorkers, including its numerous workers in the creative industry as well as visitors to the city, the importance and value it places on developing its creative industries, helping to stimulate the growth of the city's creative sector.

These examples and initiatives all provide examples of how government interventions and investments can provide the catalyst for the creative industries growth.

Recommendations

Move from a location-first approach towards skills development to a centrally led, industry-first approach that can be scaled locally, recognising that all industries have specific skill requirements, networks to navigate and unique cultures. As these elements are inextricable from one another, they should be tackled holistically.

Reduce the complexity. Creating one consistent point of contact between the creative industries and local communities can help improve the efficiency, coordination and strategic growth of the creative industries. This approach should be considered in London, particularly for a sector dominated by SMEs and freelance workers.

Develop a “Creative London” brand. London, a city that voted to remain in the Brexit referendum, now more than ever needs to redefine its identity, with creativity at its core. If executed sensitively, a brand such as “Creativity Works”, which celebrates London’s creative industries and its cultural output, will help to redefine the city in a post-Brexit era and help it to remain attractive to foreign investors, creative enterprises and workers.



Photo credit: Roger Brown for A New Direction

Chapter 2: London's Creative Landscape

The creative industries are the new heavy industries

Across the creative sector a similar story is being told: business is booming. Between the periods of 2011-2014 and 2015-2016 inclusively, the total number of jobs in London's creative industries grew by 19.06%, equating to 77,962 jobs. The number of businesses grew by 23.6%, equating to 17,331 businesses. The high number of businesses created alongside new jobs highlights how most of these businesses are small, with 95% of creative industry businesses employing fewer than ten people.⁸⁶

A high proportion of this growth can be attributed to IT and software services which on their own accounted for a phenomenal 48% of all jobs created in the creative industries and 60% of all businesses created.⁸⁷ Beyond tech, advertising and screen industries demonstrated impressive job growth, with nearly 15,000 and 14,000 jobs created respectively.⁸⁸

Figure 9: Percentage growth in creative jobs and businesses (2011-2014 and 2015-2016)⁸⁹

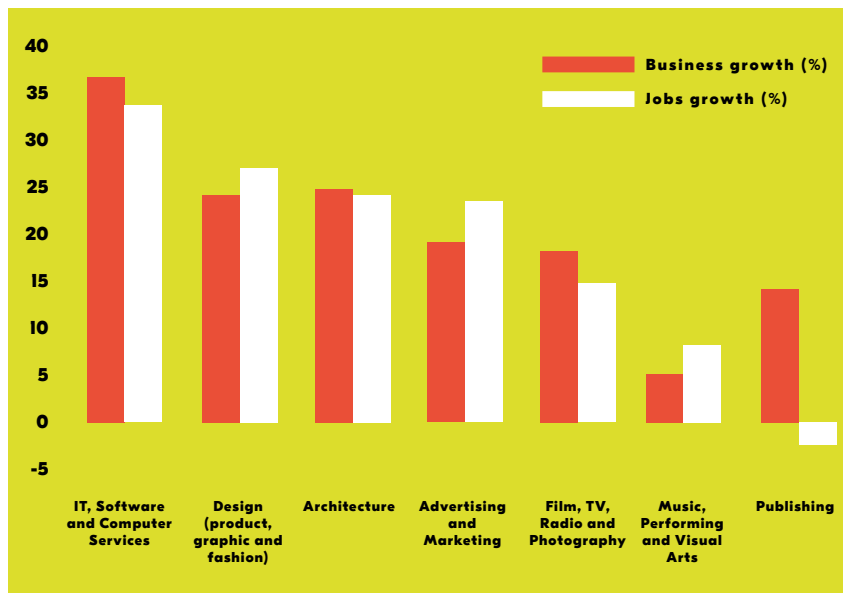
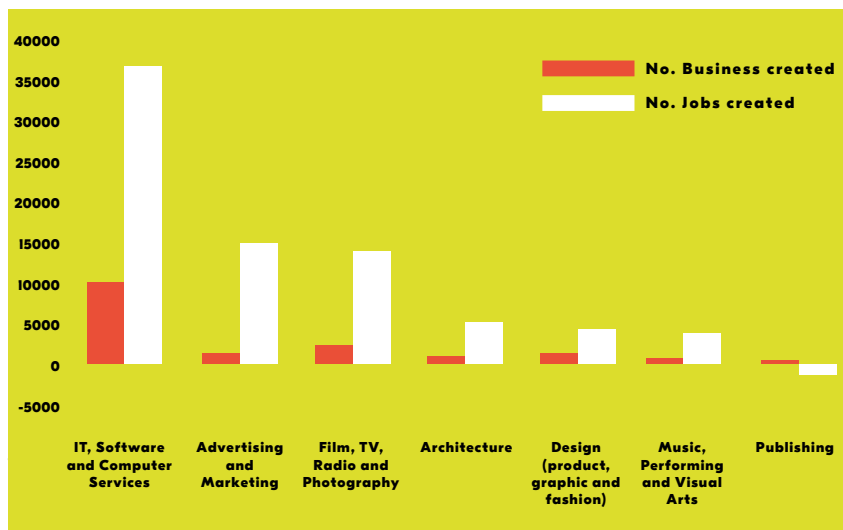


Figure 10: Net growth in the number of creative jobs and businesses (2011-2014 and 2015-2016)⁹⁰

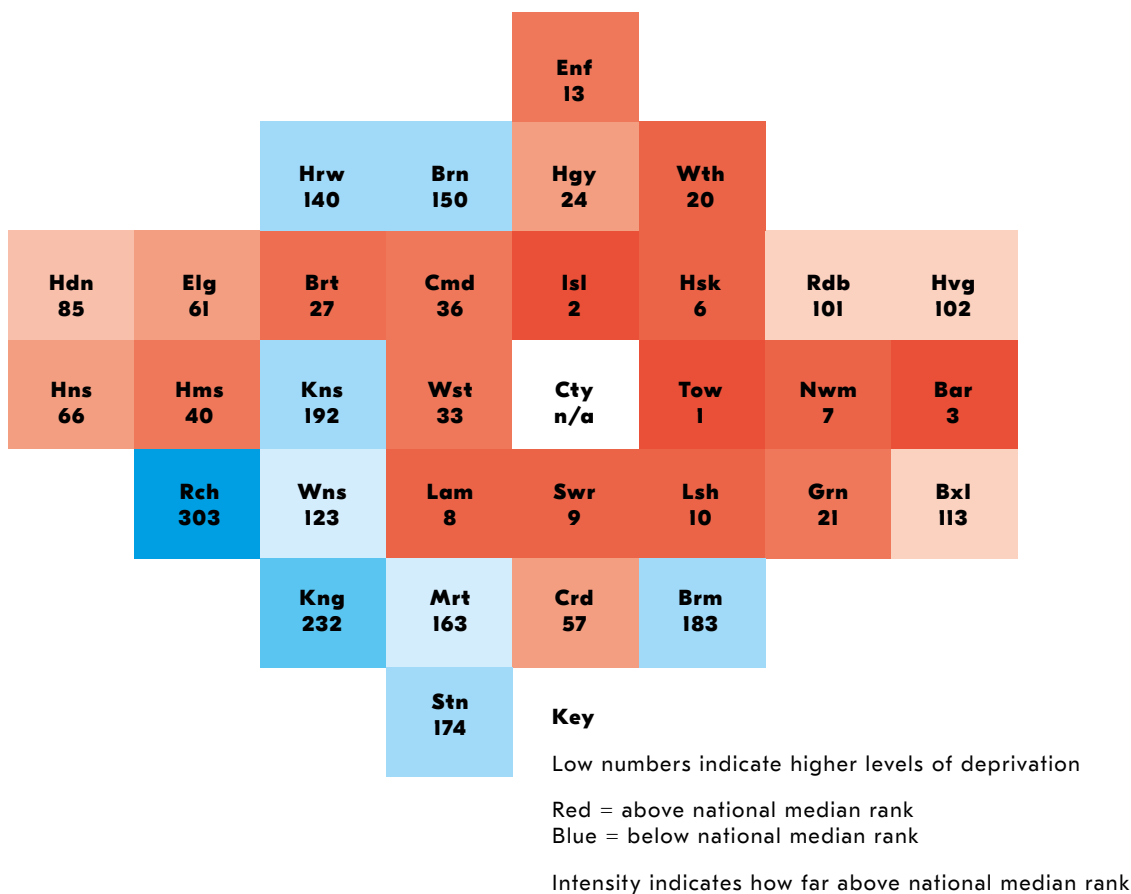


central boroughs with the City of London, City of Westminster and Camden accounting for 55% of all jobs in the tech, broadcasting and architecture sectors.⁹¹ However, these industries are growing beyond the confines of Zone 1. Barnet, Tower Hamlets and Hackney are all experiencing high growth in numbers of creative businesses, with Hackney Wick having the highest concentration of artists in all of Europe.⁹²

Growth amidst a backdrop of rising inequality

Whilst London has benefited economically from the expansion of its creative industries, the economic divide between London's richest and poorest households has simultaneously been increasing. Many of the boroughs closest to the epicentre of the creative industries' growth have some of the highest levels of child poverty in the country, as Figure 11, below, demonstrates.

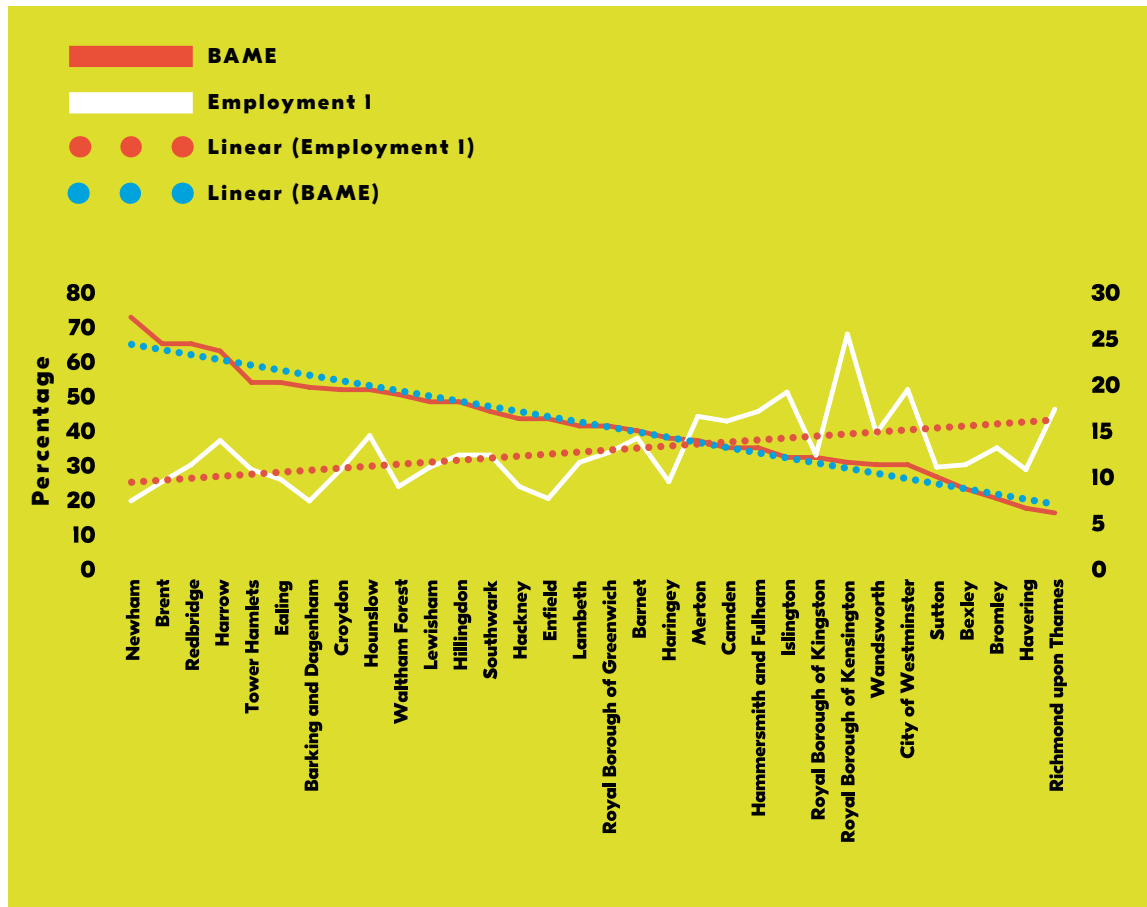
Figure 11: Rank of income deprivation affecting children by London borough, comparing all English local authorities (2015)⁹³



This map compares the level of income deprivation across all local councils in England. Palpably, most boroughs in direct proximity to the City of London and closest to the epicentre of creative growth have some of the highest levels of poverty in the country. A third of these boroughs' poverty levels are within the bottom 25 in the entire country. Whilst London has historically always had high levels of poverty, over time its nature has evolved. Now, 58% of people living in poverty in London come from working families. This has risen enormously from 28% two decades previously. The reason for this is, to a large extent, due to the ever-increasing cost of living in London, including housing, childcare and transportation costs.

Furthermore, whilst the ethnicity of London's boroughs is immensely interwoven, it is fair to argue that BAME communities are adversely affected by in-work poverty. For example, 46% of Pakistani and Bangladeshi Londoners and 35% of Black African, Caribbean and British Londoners are in low-paid work compared to 19% of white Londoners.⁹⁴ Equally, as the below chart demonstrates, geographically across London, the proportion of a borough's population working in senior positions inversely relates to the proportion of the population that is BAME.

Figure 12: Percentage of population that is BAME by London borough compared with the number of people employed as managers, directors or senior officials⁹⁵



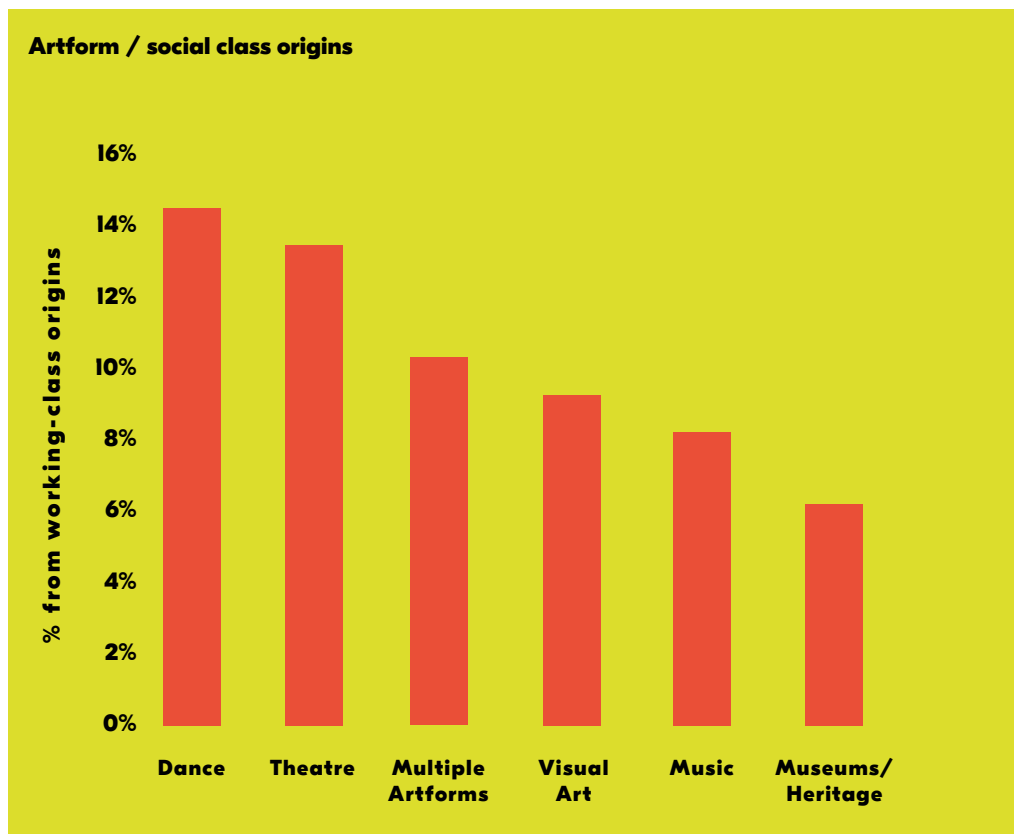
The importance of social capital to securing work in the creative industries

When it comes to improving diversity, the reason that social inequality is so vital to understand is because of the high importance social networks play in securing work in the creative industries.

“A few years ago, I did an internship at [a creative advertising agency] in London. There were 30 interns and I was the only one that actually applied.” (Create Jobs Participant, 2018)

This is supported by research from the Panic! report highlighting how people presently working in the creative industries knew fewer people working in lower-skilled roles compared to those working in creative or high-skilled jobs. For example, over 75% of people surveyed knew an artist or lecturer, but fewer than 25%⁹⁶ knew a bus driver or postal worker. Whilst it is hardly shocking that people working in creative fields would have more contact with creative workers, it begins to paint a picture of an industry that has limited contact with many different parts of London society. When we further consider that 76% of people working in London's creative industries came from a household where the main earner worked in a professional or senior managerial position (Arts Pay Report, 2018)⁹⁷ and, that 56% of people currently employed in creative media roles had found work informally,⁹⁸ it becomes clear how the creative industries - particularly more traditional “arts”, such as visual art, theatre or music - remain relatively exclusive from large sections of society.

Figure 13: The percentage of working-class people working in different creative industries⁹⁹



The cost of living

Social networks aside, the high cost of London living, coupled with the recruitment practices of the creative industries, make developing a creative career more challenging for young people from income-deprived backgrounds, who will financially struggle to support themselves even if they do manage to secure work or an internship.

“There were girls in my year, I think, in the summer were... in London, in Shoreditch, being able to work for free, whereas I could only do it for three months and that was a struggle. So, it is something that you really should be doing as a fashion designer because it really does help you, but then if you don’t have the money to do it, you don’t really get a chance to grow, so it’s not really fair.” (Panic! Report, 2018).¹⁰⁰

Equally, the Panic! Report found that 87% of people working across the cultural sector had completed unpaid work at some point in their career. Looking more specifically, unpaid internships were extremely common, with 48% of people under thirty surveyed having completed them.¹⁰¹ The figure is higher for those under than over thirty, suggesting a proliferation in unpaid internships, at least until recently.

Pay: Does it get any better?

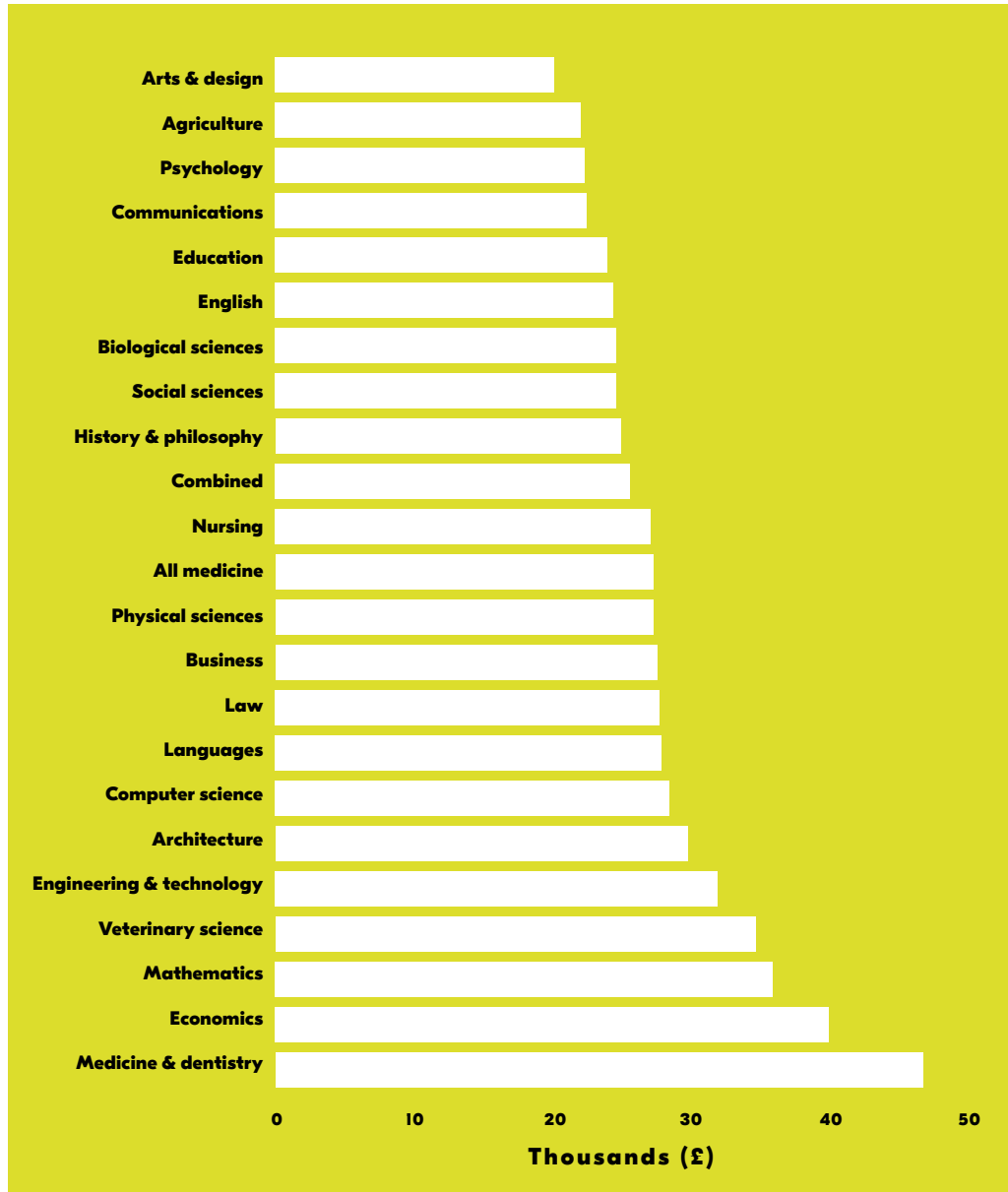
Having secured a role in the creative industries, it can be difficult for many creative workers to sustain their careers in London whilst balancing other life priorities, such as raising a family. Pay is crucial in a sector that has a high number of freelance workers. For example, a survey conducted by the Artist Information Company found that 71% of artists had received no fee for exhibiting in publicly funded galleries.

“Why can’t I be a videographer, make enough money to support [my girlfriend], two kids and live in a house? Why is that impossible? That should be possible.” (London youth, 2018).¹⁰²

“[My hope is] to stay in London. [My concern is] that I’ll get priced out.” (London youth, 2018).

This evidence is compounded by research from the Institute of Fiscal Studies, which highlights that five years after graduating, students of art and design subjects earn the least of their peers.

Figure 14: What graduates earn the most? Median annual earnings (£) by subject, five years after graduating¹⁰³



Across the creative industries, pay does vary dependent on the sector, but in several cases can be extremely low. Across music, visual and performing arts, 73% of the workforce earns less than £20,000 per year.¹⁰⁴ Equally, the museum sector is often criticised for its low pay. Guidelines published by the Museum Association highlight the below-average salaries that employees working in this sector face at all career stages. For example, the median recommended salary for an assistant in the same department (the most junior position) is £20,395, which the guidelines acknowledge to be almost £7,000¹⁰⁵ less than comparative roles in other sectors. When we consider the qualifications and investment required to even begin a career in the museum sector, where 69% of people have degrees and 10% have postgraduate degrees,¹⁰⁶ it inevitably makes it extremely difficult for people from less-affluent circumstances to consider this as a career option. Across the creative industries more broadly, many salaries have come under pressure since the financial crash. According to research from the Institute of Fiscal Studies, average salaries for an advertising account manager or creative director went down by 6% in real terms and 15% once inflation is considered. Artist salaries fell by 2% after inflation and musician salaries fell by 16%. Of course, for some

sectors the picture is rosier, with IT, design and development engineer salaries rising by 4%. It is also worth noting these roles have much higher than average salaries, at £40,094 and £51,088 respectively.

Whilst the reasons behind low and falling pay levels are incredibly complex - and in cases such as the museum sector have not been helped by cuts to public funding, nor in advertising by increased competition and digitisation - this does not have to be the status quo. To date, 61 cultural, 209 media and 185 tech organisations are accredited living-wage employers, proving that it is possible to pay fairly, given enough priority.

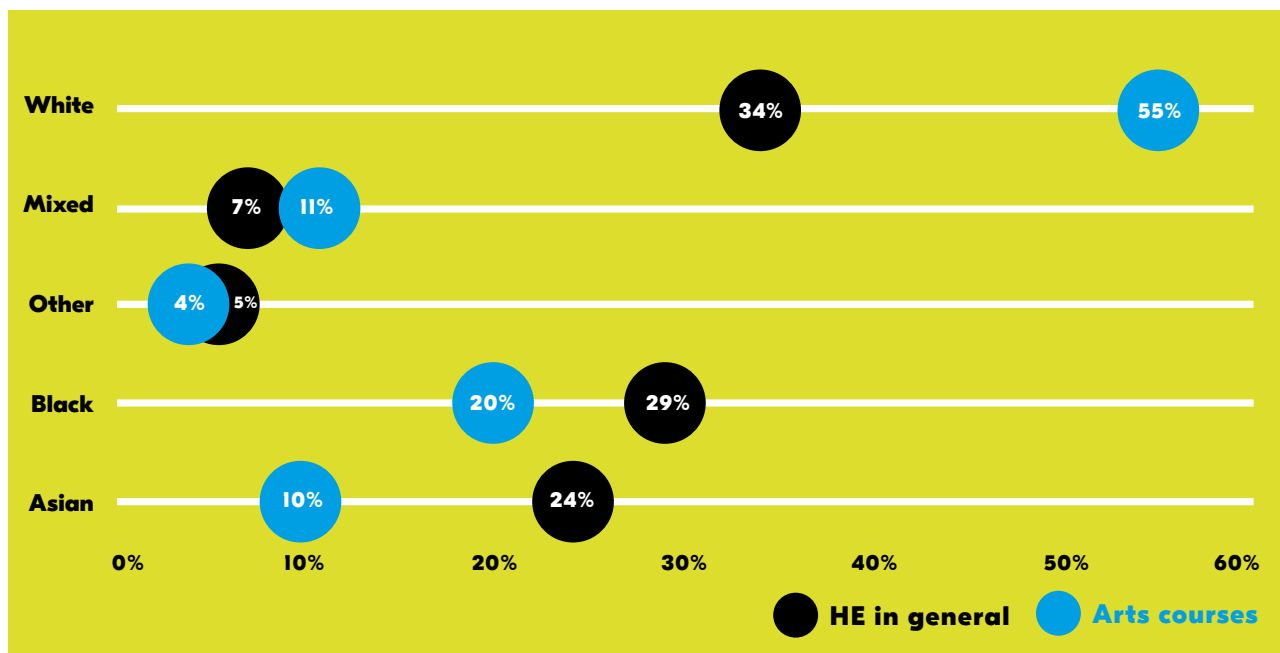
The importance of parental support

With the uncertainty and low pay that a career in the creative industries often entails, it is hardly surprising that many parents are wary of encouraging their children to embark on a creative career. Qualitative research carried out by Access HE Creative found that arts subjects are seen as having poor career prospects by BAME communities, and in particular BAME parents.¹⁰⁷ As highlighted by an interview conducted by Access HE (2017):

“If they [parents] felt like the world was not against them, it would probably be different, but I feel like there’s a lot of protection in subject choice. You need to make sure that you are doing something that can keep you secure, and no one can take away from you.” (Access HE, 2017)¹⁰⁸

The influence of parents on a young person’s career choices, particularly if they are opposed to them, is part of the reason that fewer students from ethnic minorities study arts subjects; it makes the intersectionality of representation across different arts courses complex, with some groups vastly over-represented and others under-represented. For example, of 8,150 students entering Further Education arts courses in 2014 and 2015, 1,170 were advantaged white women and just 100 were advantaged Asian men, whilst white men from less-advantaged backgrounds are over-represented on arts courses compared to their overall participation in Higher Education.¹⁰⁹

Figure 15: The percentage of students of different ethnicities on Higher Education arts courses in the UK (2014-2015)¹¹⁰



Careers advice: Are young people getting the information they need?

With the creative industries become an increasingly vital part of our economy but having a poor reputation for job security amongst many different communities, it is important to assess what quality of information young people are receiving about the creative industries and how this can be improved.

In 2011, careers advice was made the responsibility of individual schools, with no additional funding provided. This led to a “postcode lottery”¹¹¹ (Sutton Trust, 2014) in the provision of careers advice for young people, with some schools recognising and prioritising the importance of careers advice and others not at all. As a result, in January 2018 the DofE published new guidance for schools on the provision of a careers guidance offering. Now, legally, schools are required to offer all students independent careers guidance, and access to a range of employers and Further Education providers that will inform them about technical educational qualifications and apprenticeships. The guidance is built around The Gatsby Charitable Foundation’s eight benchmarks, which emphasise the importance of individual needs, encounters with employers and further education providers, alongside developing a strong understanding of the labour market and the jobs available within it.

The guidance heavily reflects the government’s overall education policy, including the importance of maths and quantitative skills:

“Schools should ensure that as early as possible, pupils understand that good maths skills are necessary element of citizenship.”¹¹²

(Department for Education, 2018)

“Because of the high returns to STEM careers, and the increasing need for many jobs to have greater quantitative skills in future, schools should make sure one of the encounters their pupils experience before year 11 is with a STEM employer or workplace, or one of their careers events is focused around STEM.”¹¹³ (Department for Education, 2018)

In short, the guidance actively prioritises a focus on STEM careers and is aligned with the subject-based approach of the National Curriculum; it puts the onus on teachers to identify relevant careers for their subject, rather than looking holistically at which range of skills is important for different careers, or what career opportunities may be available to those studying the arts.

London, more specifically, has created its own regional approach to careers advice through the development of “London Ambitions”. Through this it has developed twelve “careers clusters” across London. The clusters have three aims: to help teachers understand London’s job opportunities, to support pupils into work placements and internships, and to encourage students to try out different employer-based activities.¹¹⁴ Whilst most of these clusters are geographically focused in individual boroughs, three are focused on specific industry areas, including one focused on creative and digital careers, delivered by New City College across East London. Outside of this specific hub, however, very few of the locally focused clusters include any creative businesses, meaning that young people’s access to information on creative careers depends almost entirely on their postcode.

These circumstances raise the question of where the responsibility for preparing young people for work lies, with some employers working closely with schools and Higher Education institutions to support their careers guidance offering and others not engaging at all. It ought to be questioned whether schools should bear the entire societal responsibility for preparing young people for their future careers when future employers will be the ones that benefit from their skills.

To improve the quality of advice on creative careers, the Creative and Cultural Skills Organisation recently announced the launch, in partnership with Screen Skills and the Creative Industries Federation, of a UK-wide £2 million career service to ensure more young people have access to information and advice on developing a creative career.¹⁵ The "Creative Careers Programme" aims to reach 160,000 students by 2020 and offer 2 million young people access to better advice on pursuing a creative career. This is a welcome and necessary intervention that will help ensure more young people actively consider a career in the creative industries. However, what will remain crucial to its success is the level of engagement with different types of school, ensuring the service reaches a broad range of students from different backgrounds. Equally, whilst the intervention should be welcomed, it is questionable whether £2 million is enough to create meaningful engagements between young people and the creative industries, particularly when it is to cover the entire UK. Whilst the careers advice system remains underfunded, the challenge will be in ensuring that schools engage with the careers programme offered.

Diversity and the quality of cultural output

"I wouldn't care so much if it was a systemic and hiring issue in banking, but I care because it's in the arts. It really fucking sucks that it's in the arts, because we're suffering because of it, and this country and its cultural output is suffering because of it."¹⁶ (Panic! Report, 2018)

As a result of the issues outlined above, concern should be raised that the voices, experiences and talents of London's whole population are not being expressed, represented or developed within the cultural and creative industries, as discussed by The Warwick Commission 2015. The report highlights the important role played by the creative industries in developing a social ecosystem that is representative and expressive of all sections of society. By contrast, the levels of participation in cultural or creative activities, particularly within publicly funded institutions, vary greatly dependent on a persons' socio-economic position. For example, people from higher social groups accounted for 87% of museum visits recorded in 2012, with subsequent research suggesting this has not improved.¹⁷

It is estimated that the wealthiest, best-educated and least ethnically diverse 8% of the UK population account for a minimum of 28% of theatre performances and 44% of live music performance attendances. This is despite 70% of the adult population and 84% of young adults claiming that music was of importance to them. As Arts Council England invests approximately £85 per head on theatres and £94 per head on music,¹⁸ it needs to be considered that the programmes of some of our publicly funded institutions are not reflective of the cultural tastes of a wide section of the population.

The Warwick Commission report, "Enrich Britain: Culture, Creativity and Growth" argues that both public and private institutions should be incentivised by the DCMS, BIS and Treasury to work towards a diverse and representative workforce, therefore leading the national diversity agenda by example. Specific recommendations include ensuring the boards of organisations that are at least 25% publicly funded should have approved training on diversity and participation development for their chairs, with a plan in place to build this expertise within their teams.¹¹⁹

However, the limited scope of diversity training, in the absence of any tangible identifiable diversity targets, has been well documented. Several studies¹²⁰ have suggested that unconscious bias training, whilst effective at raising awareness, does not eradicate explicit bias, i.e. shifting the attitudes and beliefs we have about a person or group on a conscious level.

"Towards a Cultural Democracy" by King's College London takes the argument further. It recognises that cultural and creative activity takes place outside of the confines of the traditionally defined arts and creative industries. It argues that the hegemony of publicly funded organisations that have been predetermined as worthy of public money needs to be challenged, given that creativity and culture develop in so many hidden and unexpected places; in other words, that it is indefensible to allocate such a high proportion of public funding to organisations that are frequented by a small minority of the population.¹²¹

This would have a significant impact on how the arts are funded in the UK and London, presumably redirecting funds away from larger institutions, freeing up more investment that could then support fledgling creative businesses in local communities. This could have a hugely positive impact on diversity if a wider range of creative industries were able to flourish and become more visible. It would, however, have the potential to inflict damage on institutions that act as a huge attractions to tourists and help position London as world-leading creative hub. As ever with London, balancing the local with the global is a perpetual contest.

Urgent issues to be addressed

Recruitment practices need to change

The recruitment practices of the sector are in clear need of reform; as the research suggests, many if not most people working in the sector still secure work through connections rather than application. In a sector which, broadly, is dominated by people from more advantaged backgrounds, informal recruitment practices make it more difficult for people outside of the creative industries' sphere of influence to break through.

It's too expensive to work in the creative industries

The high cost of living in London makes accessing careers in the creative industries, often involving lengthy periods of unpaid work, challenging for young people from less-advantaged backgrounds. This problem is not exclusive to London; many cities in developed economies are struggling with the increasing poverty and the unaffordability of housing. However, with almost 12% of London's workforce employed in the creative industries - higher than many other cities - coupled with their ability to move location easily, it is vital London should put steps in place to ensure that creative people and businesses are financially able to support themselves at early stages and throughout their career.

Poor links between creative industries and young people

Whilst some schools have developed a considered careers guidance offering, this is not consistent. A uniquely school-based approach to careers guidance creates a danger that the quality of access young people receive is unequal, not only in the quantity and type of advice received but also, and more importantly, in the type and variety of employers and Further Education institutions that young people can engage with. For example, the Creative Digital Cluster operating in East London should be celebrated for the many programmes it runs offering local students' insights into careers in the creative and digital industries. However, this programme only runs across selected schools in a specific area of London, whilst many of the locally based careers clusters have no connections with the creative industries at all.¹²² This highlights the piecemeal nature of careers guidance for young people.

Perception of the creative industries and quality of cultural output

Partly because of the many issues highlighted above, there is a poor perception across many communities as to the stability of a creative career, as well as a broader lack of understanding of the possible pathways available. Equally, the most privileged are vastly over-represented among participants in publicly funded culture, suggesting the cultural output of many of our publicly funded institutions is not representative of the tastes and values of large parts of London's population. David Osa Abadasum (2013) refers to this as the "mundane violence of cultural value".¹²³

This has the possibility to lead to a never-ending cycle whereby different communities do not engage with culture because it doesn't reflect their tastes, and are therefore less interested in or engaged with creative careers.



Case Studies

Easing the financial pressure on young creatives: Toronto

To make the creative industries accessible to a wider section of society, local governments need to do more to ease the financial pressures on creative workers. As an example, Toronto, whose screen industries are an extremely important part of the economy, has attempted to ease the financial pressure on some of its creative workforce by offering landlords a 50% reduction in tax if they provide arts and cultural space to practitioners at a minimum of 30% below market rent. Whilst London has a comparatively high number of artistic spaces available to rent, more could be done to ease the financial pressure on young creatives. This chimes with suggestions by the BCG that acknowledge the importance of supporting young creatives in the early stages of their career development.¹²⁴

Actions speak louder: BFI diversity standards

The British Film Industry has taken matters into its own hands by creating its own diversity standards. These ensure that any project funded by the BFI meets at least two of the four identified diversity standards, which are: A) on-screen representation, B) creative leadership, C) industry access and training opportunities, and D) distribution and exhibition strategies. The aim of the framework is to deliver behavioural change and inspire project leaders to use more inclusive practices. In addition to being used for BFI-funded projects, to date it has also been adopted by Film4 and BBC Films, which provide the majority of funding for UK films.¹²⁵

This case study demonstrates the power that can be wielded by funders and investors, or those that hold the purse strings, in order to create wider change if adopted by all publicly funded institutions.

Changing business culture: Sky

“Diverse teams deliver the best results. Fact.”¹²⁶
(Chris Stylianou, CEO, Sky Europe)

This quote by Sky’s CEO highlights a key aspect of their successful strategy to improve representation of women across the organisation. With buy-in at board level, Sky has been able to adopt strategies that allow the company to both recruit more women and successfully retain them. Through simple actions, such as changing the wording of job applications, Sky has been able to attract more female candidates, and therefore to hire more women without introducing quotas.

Beyond just attracting more female candidates, Sky recognised that, in general, women were less familiar with self-promotion and networking. To combat this, Sky created a sponsorship programme that linked top managers’ performance directly to the progression of their team. This increased the number of promotions of women by 30%.¹²⁷

Whilst this case study focuses purely on gender diversity, the lessons are transferable to other integration issues. By taking the time to understand and relate to a wider range of different types of job applicant, processes can be adopted that help move an organisation from simply talking about diversity towards a culture of integration.

Recommendations

Make financial support available to young creatives. As an ever-more-important part of our economy, supporting young creatives should be considered an investment in the future sustainability of the industry. Schemes that reduce housing and living costs help reduce the financial burden on young creative people and can be executed at bigger scale.

Introduce London Living Wage. As a bare minimum, the London Living Wage should be paid for all entry-level roles across the sector, and this should be a commitment made by all creative businesses. Looking forward, all creative businesses should strive to offer rates of pay that allow people from different backgrounds to sustain long-term careers in the sector.

Funders should be accountable. Aligning funding based on diversity standards ensures it is allocated in a way that more proportionately represents the diversity of the population. This will, in turn, ensure the realisation of projects that better reflect the cultural tastes and values of different parts of society.

Companies need to understand the demographics they want to hire. The Sky case study demonstrates how, by taking the time to understand different demographics, recruitment and retention practices can be adapted to help maximise the abilities and growth of different types of people.

Coordinate careers advice. Careers advice should be strategically coordinated across sectors and schools, to ensure that all young people and their parents are made aware of the spectrum of opportunities open to them in the creative industries.



Photo credit: Ketishia Vaughan



Chapter 3: Developing the Workforce of the Future

Developing talent in a changing world

The previous section outlined the significant challenges to be overcome in order to support an integrated, creative workforce within London's ecosystem. However, the wider job market is evolving rapidly, with the demand for creative skills increasingly bleeding into new sectors. Across the entire economy, a rapid change is occurring in the skills and mindsets required by the workforce of the future. As the world moves through a period of technological and environmental change, both the creative industries and the economy need a new type of worker. Scharmer (2016) argues that, for economies of creation, it is fundamentally important to develop people's mindsets. The ideal mindset he describes as "presencing",¹²⁸ which requires people to move together in an architecture of collaboration and connection. He further argues that the huge challenges the world is attempting to solve can only be achieved through collaboration on a global scale; that nothing can be achieved through working in siloes. Whilst this attitude may seem relatively self-evident, there are ways in which the current education system acts counterintuitively to this idea, as we will go on to explore in this section.

Similarly, within the creative industries uniquely, there is a growing demand for what are described as "T-shaped" workers,¹²⁹ who have a specific area of expertise but can understand and communicate with a broader range of disciplines and will help provide a strategic plan for the sustainable growth of their businesses and the wider industry. These skills are particularly important as many creative workers are self-employed, requiring entrepreneurial ability and strategic vision in addition to inherent creativity.

In this chapter, therefore, we look forward to understand how we can support young people's entire development and wellbeing so they can access and flourish in the creative economy of the future. We will look at the individual sectors and jobs that are likely to increase in demand, assess how the education system is set up to meet these demands and make recommendations on what improvements could be made.

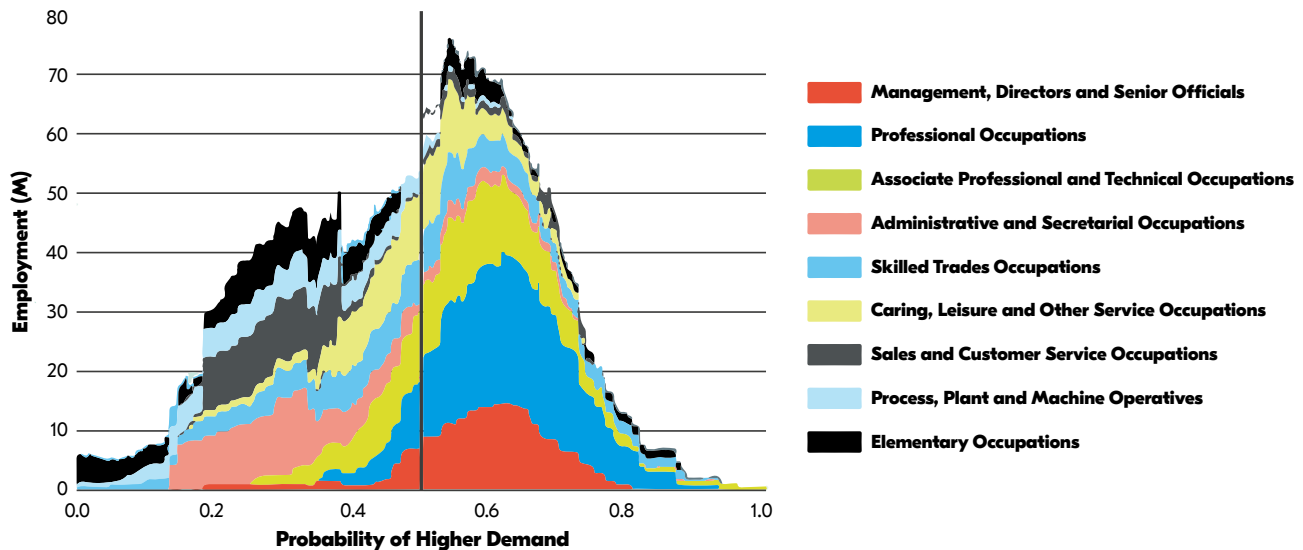


The future of jobs

A recent report by Nesta and Pearson (2018) provided a detailed and helpful analysis of the future of jobs. Tellingly, this analysis combined the use of statistical data, insights from experts and machine learning to generate predictions on the skills and jobs that will be most in demand in the future. The research covered the UK and the US.

According to their analysis, 21.2% of jobs have a lower than 0.3 probability of increasing in demand, 51.8% of jobs have a higher than 0.5 chance of increasing in demand and 8% have a higher than 0.7 probability of increasing by 2030.¹³⁰ If we break this down further, however, the trends vary dependent on the individual sector.

Figure 16: The likelihood of increase in job demand organised by sector¹³¹

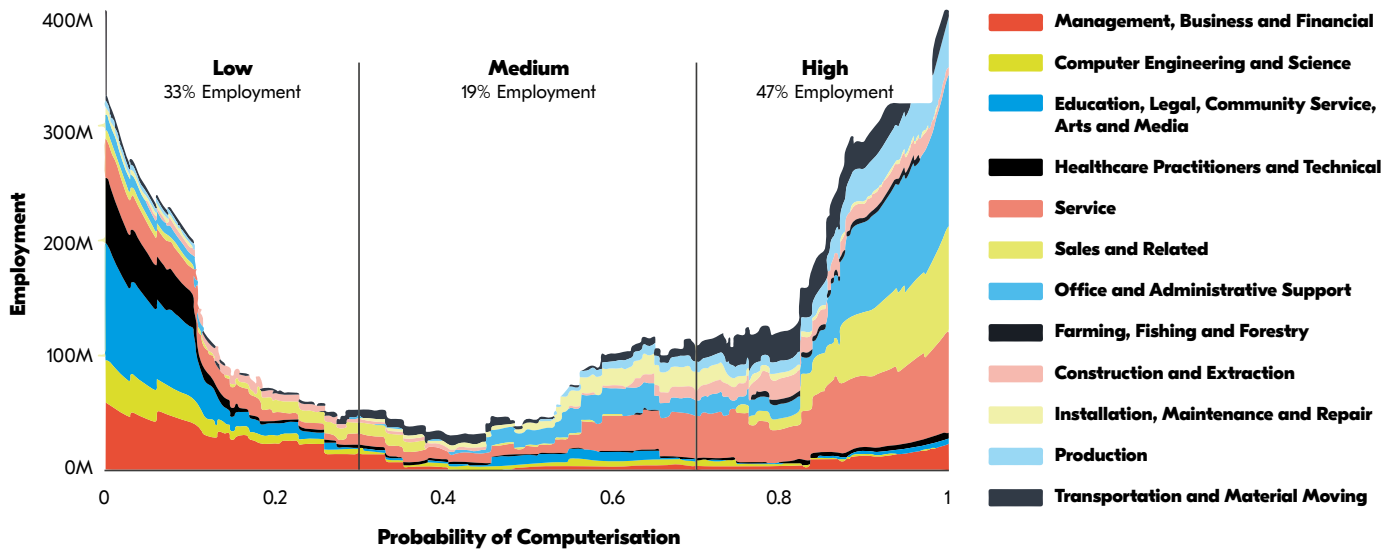


The above chart demonstrates the distribution of probability that sectors will increase or decrease in demand between now and 2030. Immediately noticeable is how “Professional Occupations” dominate the right-hand side of the graph. Many professional occupations have a high likelihood of increased demand in the next twelve years. These include creative, digital, design and engineering occupations. Architectural and green occupations are also likely to increase in demand as increased urbanisation and environmental concerns heighten. By contrast, a high number of sales and customer services roles have a low likelihood of increasing in demand, alongside administrative, elementary and manufacturing jobs. This points to an overall decrease in lower-skilled work in the future, chiming with other research conducted in this field.

Previously, Frey and Osborne (2013) analysed the future of skills using a slightly different methodology. They predicted that the proliferation of data and the capacity of machines to automate data using algorithms will lead to an increasing and surprising number of roles becoming automated, including translating, mass production and logistic-based jobs. Conversely, they identified that jobs requiring a high degree of social intelligence, creativity, perception and manipulation are the least likely to be susceptible to automation. These include roles such as data architects, UX designers and fitness instructors.¹³²

Autonomous manipulation in unstructured environments is difficult to automate. In other words, tasks that require a singular input in a unique environment are difficult to create efficient algorithms for. Frey and Osborne used this hypothesis in order to predict changes in the job market. By mapping required levels of perception, manipulation, creativity and social intelligence against jobs that currently exist, they were able to predict the likelihood of automation within different sectors.

Figure 17: The probability of computerisation of jobs in the UK organised by sector¹³³



The clear trend across both studies is for an increase in jobs that are higher skilled (for example, computing) and require a high level of social intelligence (for example, management) and/or empathy (for example, community services, arts and media).

“The Future of Skills” report by Nesta went further, categorising skills, abilities and knowledge to provide a detailed list of variables that correlate most strongly with a high probability of increase in demand. (Please note that the Pearson coefficient, used for correlation, lies between -1 and 1.)

Figure 18: A ranking, by Pearson correlation, of the importance of O*NET variables to future demand for UK occupations¹³⁴

Rank	O*Net Variable	Class	Pearson Correlation
1	Judgment and Decision-Making	Skills	0.752
2	Fluency of Ideas	Abilities	0.732
3	Active Learning	Skills	0.721
4	Learning Strategies	Skills	0.715
5	Originality Abilities	Abilities	0.710
6	Systems Evaluation	Skills	0.703
7	Deductive Reasoning	Abilities	0.672
8	Complex Problem Solving	Skills	0.671
9	Systems Analysis	Skills	0.670
10	Monitoring	Skills	0.663
11	Critical Thinking	Skills	0.658
12	Instructing	Skills	0.657
13	Education and Training	Knowledge	0.636
14	Management of Personnel Resources	Skills	0.635
15	Coordination	Skills	0.620
16	Inductive Reasoning	Abilities	0.611
17	Problem Sensitivity	Abilities	0.601
18	Information Ordering	Abilities	0.575
19	Active Listening	Skills	0.571
20	Administration and Management	Knowledge	0.559

Strikingly, few of the highest-ranking variables are from “knowledge” capabilities. Interestingly, the picture is slightly different if we compare variables that are likely to be the highest in demand in the US.

Figure 19: A ranking, by Pearson correlation, of the importance of O*NET variables to future demand for US occupations¹³⁵

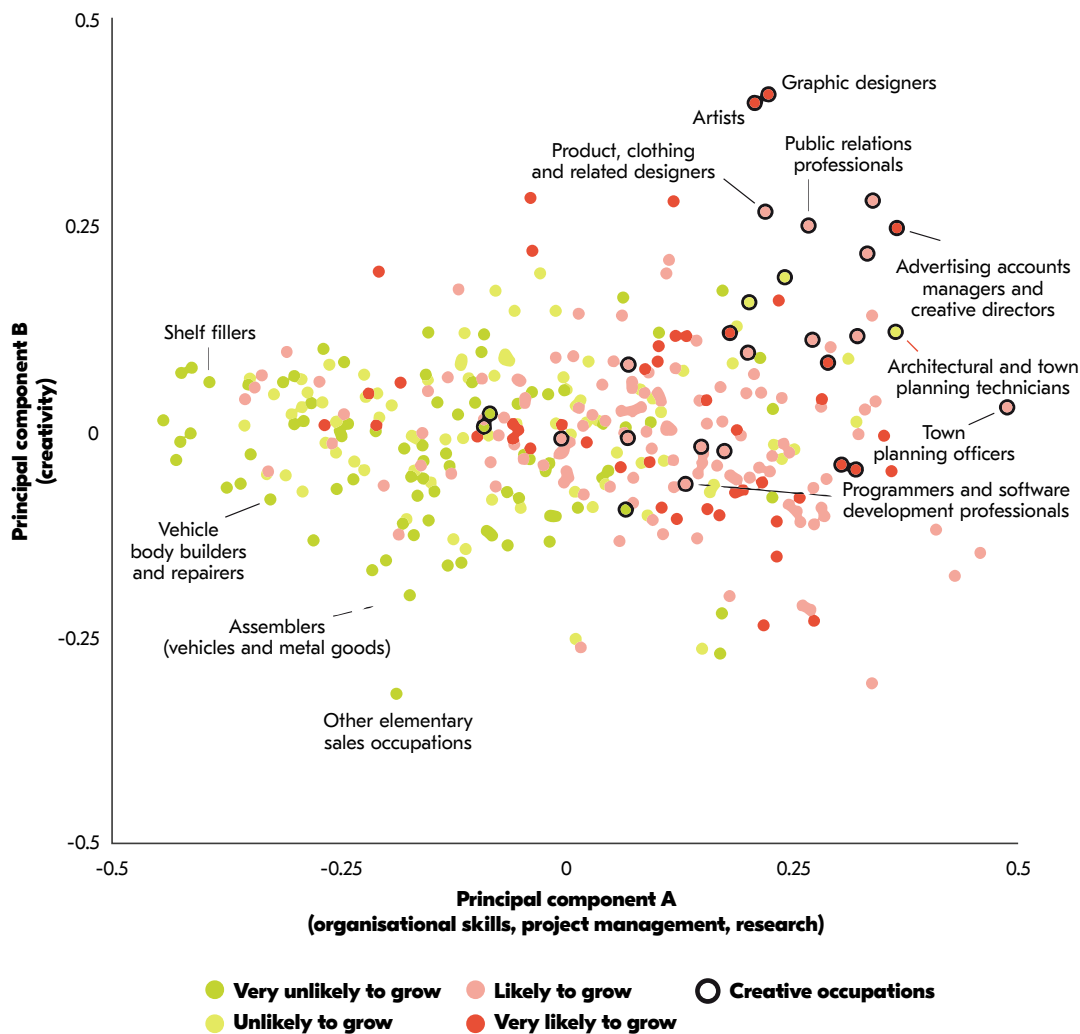
Rank	O*Net Variable	Class	Pearson Correlation
1	Learning Strategies	Skills	0.632
2	Psychology	Knowledge	0.613
3	Instructing	Skills	0.609
4	Social Perceptiveness	Skills	0.605
5	Sociology and Anthropology	Knowledge	0.603
6	Education and Training	Knowledge	0.602
7	Coordination	Skills	0.571
8	Originality	Abilities	0.570
9	Fluency of Ideas	Abilities	0.562
10	Active Learning	Skills	0.534
11	Therapy and Counseling	Knowledge	0.531
12	Philosophy and Theology	Knowledge	0.526
13	Speaking	Skills	0.514
14	Service Orientation	Skills	0.511
15	Active Listening	Skills	0.507
16	Complex Problem Solving	Skills	0.502
17	Oral Expression	Abilities	0.493
18	Communications and Media	Knowledge	0.491
19	Speech Clarity	Abilities	0.489
20	Judgment and Decision-Making	Skills	0.482

As we can see, in the US a higher number of knowledge capabilities makes it into the top 20 (Pearson correlated 120 variables in total). That said, it is interesting that the knowledge areas that correlated most are focused on social or psychological development, such as therapy and counselling, philosophy and communications. Knowledge areas including computers and electronics, geography, economics, accounting, mathematics and medicine do, according to NESTA's analysis, correlate with jobs that will increase in demand; however, the correlation is weaker than the skills and abilities that make the top 20. This strongly suggests, as many studies have also argued, that knowledge itself will decrease in importance in the economy of the future and, as this report shows, learning abilities, problem solving and creative skills will be most valued. Many different studies have characterised these future skills in different ways, but there are broad areas of agreement. Ernst and Young identify 5 Key Future Skills: creativity, complex problem solving, collaboration, cognitive flexibility and emotional intelligence.¹³⁶ These correlate with the top variables discovered by Nesta.

The future of jobs in the creative industries

A recent report by Nesta's newly created Policy and Evidence Centre analysed over 35 million job adverts from across a range of industries, uncovering some fascinating trends in the skills that are most in demand across the creative industries. Firstly, it identified that roles in the creative industries (identified by the DCMS) are 4.3 times as likely to mention "creativity" as a core skill requirement than the wider job market, including some tech occupations, such as software developers. This may not be that surprising, but is important, as the report also found that creativity as a core skill was "the most significant predictor for an occupation's chance of growing as a percentage of the workforce by the year 2030."¹³⁷ This confirms findings from other reports that the number of jobs in the creative industries and jobs involving a high level of creativity are likely to grow. Beyond the value of creativity itself, the findings suggest when creativity is coupled with management and organisational skills (such as project management) or critical thinking skills (such as research), the likelihood of a job increasing in demand is even higher. These included product designers, graphic designers, programme and software developers, town planners and artists.

Figure 20: Projections of 4-digit SOC occupation growth based on two principal components: creativity and management skill¹³⁸



Creating growth mindsets

Despite the helpful analysis provided by various reports, there is only so much that can be predicted at a granular level when, in such a rapidly evolving world, it is highly likely that many of the jobs of the future do not yet exist. The development of resilient and adaptable mindsets will be absolutely critical in order to ensure that young people have the mental agility to respond to the changing needs of the future world. As argued by Andreas Schleicher of the OECD Education Directive, “we live in a fast-changing world, and producing more of the same knowledge and skills will not suffice to address the challenges of the future. A generation ago, teachers could expect that what they taught would last their students a lifetime. Today, because of rapid economic and social change, schools have to prepare students for jobs that have not yet been created, technologies that have not yet been invented and problems that we don’t yet know will arise.”¹³⁹

Yet current UK education policy would seem to fall directly foul of this, as a speech by the Schools Standards Minister demonstrates.

“We believe the focus of our curriculum should be on that common body of knowledge that, until recently, all schools were expected to teach. This is the background knowledge taken for granted by writers who address the intellectually engaged layman – the shared frames of reference for public discourse in modern liberal democracies. Sometimes referred to as ‘intellectual capital’, at other times as ‘cultural literacy’, this storehouse of general knowledge will enable all our pupils to grow to their full stature. Passing on this knowledge, as well as the ability to use it wisely, is what we mean by a classical liberal education.”¹⁴⁰ (Nick Gibb, Schools Standards Minister, 2017)



Photo credit: Francis Augusto

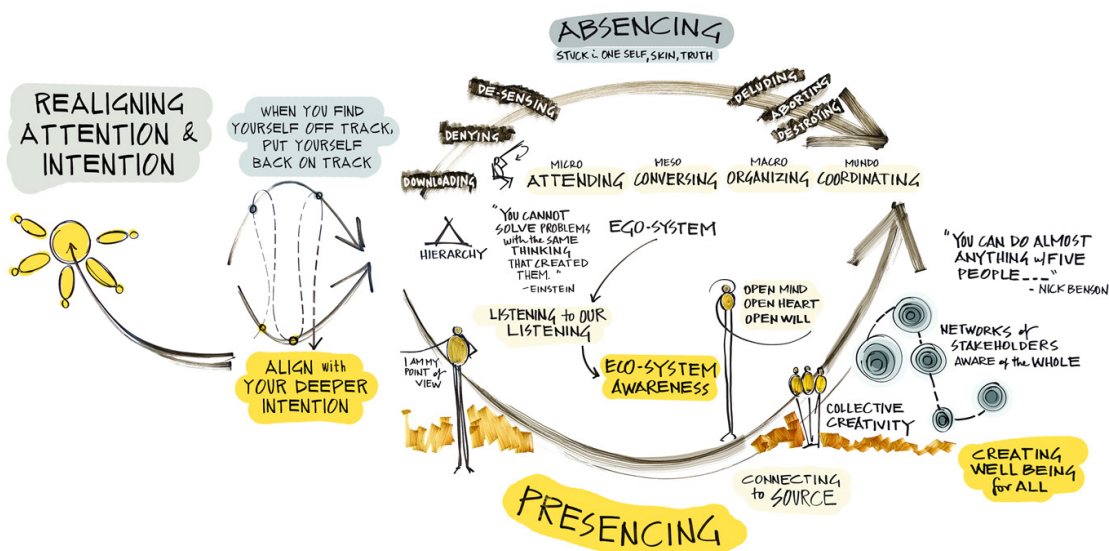
"It gives you the confidence to discuss a wide range of live topics with those around you, it gives you social status. It makes you part of the club that runs the world, and the inside track to change it."¹⁴¹ (Ibid.)

Debates surrounding a knowledge-vs-skills-based education have been well fought, and we do not wish to reiterate them here. What these quotes demonstrate, however, is the underlying philosophy behind the strategy, which focuses on the importance of learning an established body of knowledge to improve social mobility, suggesting that it is up to the young person to adopt the same thoughts and ideas of previous generations in order to become part of the "elite".

The challenge with this, according to Scharmer (2016), is that there are two sources of learning: the past and the emerging future. Focusing on the past, he argues, has created a reactive approach to the challenges that face us, such as treating diseases by cure rather than prevention. In order to attend to the emerging challenges, he argues, we must "drop all our old tools and attend to the situation with fresh eyes."¹⁴² The alternative, past, learning-led approach, he argues, at best leads to "muddling through" and at worst leads to moving apart, or "absencing", whereby society recognises that things need to change but identifies the problem as "them not us", leading to delusion and often destruction, as we are seeing play out in today's political landscape.

If we look at the above excerpts from the government's speech again, it is easy to identify an "us" and "them" approach, identifying a distinct elite of which young people can either adopt the views or be excluded from. What we need from today's workforce is an ability to understand different points of view, collaborate and focus. This is described as "the reintegration of matter and mind".

Figure 21: Intention theory (Scharmer, 2016)¹⁴³



IDEAS Indonesia, Cambridge MA USA, 201409 - Kelvy Bird - Presencing Institute - www.presencing.com/images

In summary, the evidence proves that developing the workforce of the future will require the education system, and the wider socio-economic system in which it operates, to focus on the development of the whole person rather than homing in on unique skills or knowledge areas. It is important, therefore, to assess the education system and how well it is preparing young people for future work in this context. Not all this needs to be left to chance. PISA (the Programme for International Student Assessment),¹⁴⁴ for example, is in the process of developing a creativity test that would help benchmark students across different countries. This would give us an indication of how well the British education system is preparing students for the future of work.

Higher Education: What is its purpose?

“Academic ability...has really come to dominate our view of intelligence because the universities design the system in their image... the whole system of public education around the world is a protracted process of university entrance. The consequence is many highly talented creative people think they are not.”¹⁴⁵ (Ken Robinson, 2006)

As this quote shows, there is growing concern that the education system is more focused on preparing students for university via siloed, subject-based pedagogies than on developing students' practical skills necessary for work. It has been argued that policy makers are obsessed with “a siloed, subject-based curriculum and early specialisations in Arts or Science disciplines” when “we need creative scientists as much as we need artists who understand the property of materials and the affordances of new technologies”¹⁴⁶.

This siloed approach taken by schools could be driven by how universities themselves teach. Lee, Kendal and Simmons (2017)¹⁴⁷ argue that the 20th century was the first in human history where it was not habitual for scholars of natural science, for example, to also be philosophers, pursuing a range of interests that often served in the development of scientific breakthroughs. Perhaps as a result, in a recent survey of British employers, just 23%¹⁴⁸ believed that universities were adequately preparing students for work. Despite this, 95%¹⁴⁹ of those surveyed confirmed they were planning on hiring recent graduates.

The inevitable question this poses, particularly in the context of rising university fees and the burden of debt this puts on young people, is whether university is the right forum to prepare young people for work in all cases.

For the tech and creative industries specifically, more informal training courses are being developed that mean young people can circumnavigate university to access a career in the creative industries and have the potential to disrupt the traditional Higher Education model. General Assembly, for example, offer short courses in tech, including design, coding, marketing and product management.

These courses can be expensive, but offer a shorter and less-expensive alternative to university, and can be completed whilst working. Equally, apprenticeships incentivise larger creative businesses to recruit from outside the traditional university milk round. Despite this, the apprenticeship levy remains contentious and has been criticised by several leading creative industries bodies. Screen Skills, for example, has argued that it is unlikely that creative businesses will be able to spend more than 27% of the £75 million contribution paid by the industry, with many employers struggling to facilitate the number or duration of apprenticeships.¹⁵⁰ For example, the top six VFX companies would need to take 122 apprentices between them to use the entire levy.¹⁵¹

Beyond apprenticeships and paid courses, there are several bespoke training courses that aim to build connections between young people and the creative industries. New Museum School, for example, funded by the Heritage Lottery Fund, offers year-long paid traineeships to young people looking to access a career in heritage. The programme includes month-long classroom training and practical work experience, and students receive a RQF diploma in Cultural Heritage upon completion of the year.¹⁵²

These provide examples of innovative ways that we can train young people for work in the creative industries, which involve a combination of practical on-the-job training with the teaching of soft skills. However, whilst the funding and therefore delivery of these schemes remains relatively disjointed, the potential impact of these programmes cannot be fully measured.

Urgent issues to be addressed

Automation is inevitable

The analysis demonstrates there is broad agreement amongst researchers on the types of jobs that are most likely to be susceptible to automation in the future. These include many lower-skilled jobs, including sales, administrative support roles, service jobs, manufacturing and elementary jobs. In total, 27.1% of London's population¹⁵³ are employed in narrower-skilled, lower-paid jobs in caring and leisure roles, sales and customer services jobs, process, plant and machine operation roles or elementary jobs, all of which are likely to decrease in demand in the future. Moreover, if we consider that the academic achievements and life outcomes of young people growing up in low-income households are often far worse than those of their wealthier contemporaries,¹⁵⁴ there is an urgent need to ensure that all young people, irrespective of their background, are developing the relevant skills, qualifications and networks to access the job market of the future - especially as the number of lower-skilled jobs available to them, requiring fewer qualifications or training, is highly likely to decline. This could leave many of our young people excluded altogether from our future workforce.

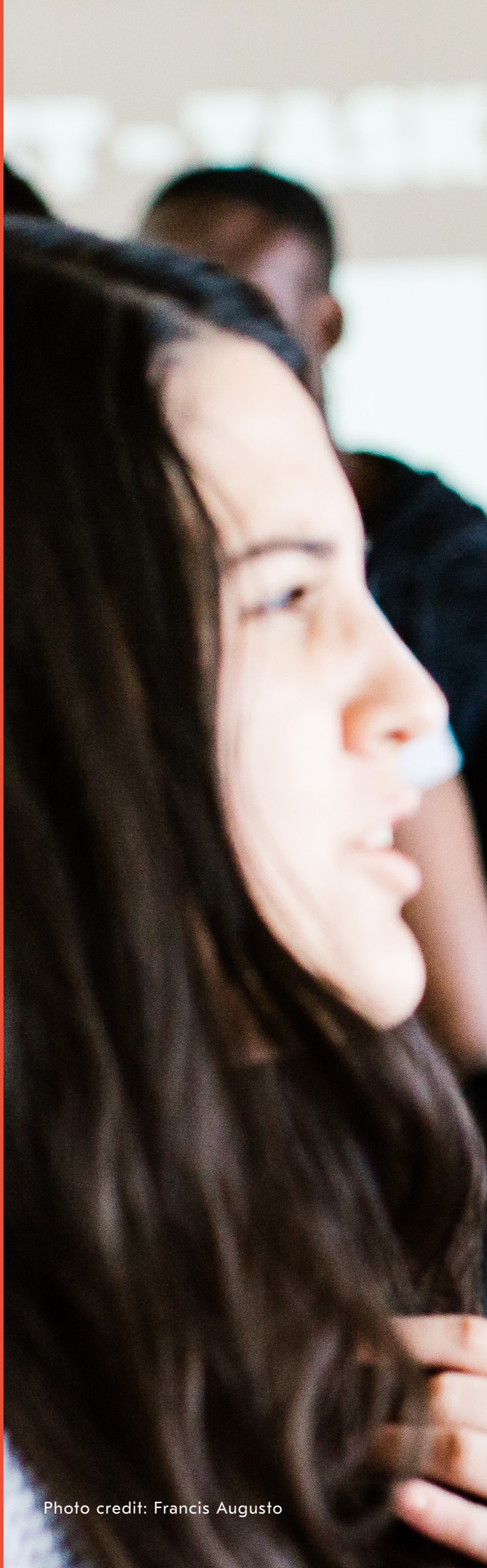
Looking more specifically at the creative industries, the research reviewed suggests their growth is set to continue, with many creative jobs (including artists, designers and software developers) likely to increase in demand, increasing the proportion of London's population working in the creative industries. Furthermore, the demand for creativity within a role directly correlates to the likelihood of it increasing in demand, complemented by organisational and project-management skills. Therefore, in order to guarantee the future prosperity of London's workforce, we must ensure its citizens are able to develop their creativity and ability to apply this constructively in work.

Higher Education: An outdated model?

"Goldman Sachs doesn't intrinsically care about Harvard. They care about finding the best person for the job. Elite brand degrees have just traditionally been the best proxy metrics for that because precise metrics weren't heretofore available."¹⁵⁵ (Ferreira, 2013)

An increasing proportion of the workforce is being encouraged to complete Higher Education. However, at present the Higher Education system, which over time has become increasingly divided into narrower and narrower subject areas, is not fulfilling the needs of employers looking for a wider range of skills in their future employees. The cycle seems perpetual, with employers wedded to graduate recruitment, the school system wedded to Higher Education and Higher Education remaining static.

This really brings into question what the future role for Higher Education should be, and whether it is the most suited institution in which to develop a workforce. It has been identified as a key means of increasing social mobility for the young; however, many young people are leaving university without the necessary workforce skills or social networks to secure work, particularly within the creative industries. This challenges the whole notion of qualifications as an adequate means of testing a person's suitability for work in the first place.



Case Studies: A different approach to person development

Despite the arguably narrow focus of the education system, its recent academisation has led to several strong examples of schools that approach education differently, developing both skills and knowledge via project-based learning techniques to develop the young person's broader capabilities.

School 21

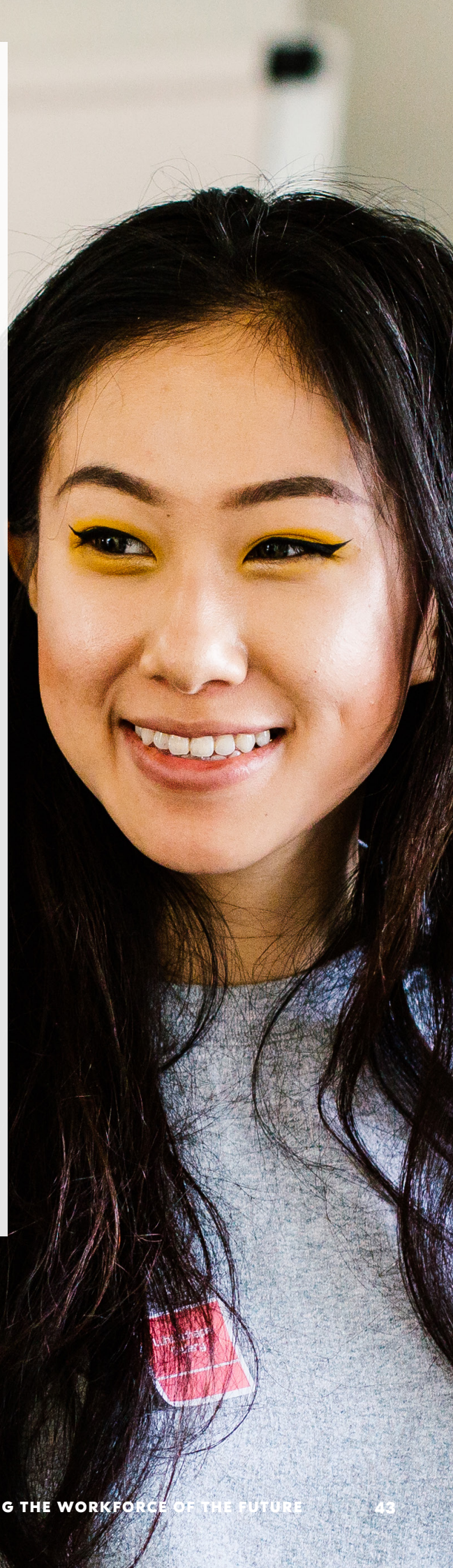
School 21, based in the heart of London's multicultural Newham, where a high majority of young people live in poverty and/or have English as a second language, adopts a radical approach to education compared to many of its contemporaries, by offering students many more "real-world" interactions than are typically offered by traditional education. As an example, students in the school were asked to develop a project that involved children working up mathematical models to show how the proposals for new concrete factories on the Olympic Park would harm the environment. Working with local groups, they wrote papers and campaigned. After speaking with the planning committee, the plans were shelved. This project involved Maths, English, Oracy and group work whilst making a difference to the community.¹⁵⁶ School 21's approach to education in such a multicultural environment prioritises real-world learning, English language, wellbeing and technology. As part of their education, students get the opportunity to solve real-world problems through work placements. As an example, some students were given the opportunity to work at HSBC in order to help them reimagine banking for young people.

School 21's results speak for themselves. In its most recent Ofsted inspection, it was rated "Outstanding" in all categories, and across all tests its students perform better than the average.

Figure 22: School 21 performance (2018) compared to the national average¹⁵⁷

	National	School 21
English and Maths 4+	63%	80%
English and Maths 5+	40%	55%
Attainment 8	44.3	49.95
Progress 8* (provisional)	0	0.49
EBACC Point Score	3.83	4.77

When we consider that half of School 21's pupils receive free school meals, and over twenty-five different nationalities are represented, the results are particularly impressive. It also demonstrates the wealth of talent that is waiting to be uncovered in London's young people, if nurtured in the right way.



South Korean exam-free semester

Looking further afield, in 2016 South Korea adopted an exam-free semester for middle schools nationwide. During this semester, there are no traditional written examinations, and students are afforded time each day to study either a non-traditional course or to design their own independent study course.¹⁵⁸ Students are encouraged to develop key competencies through experience-based activities, such as discussions, science labs, project-based learning and free semester activities, such as career exploration, theme-based learning, fine arts, physical activities and club activities. In Seoul, the programme was so well received that the Metropolitan Office of Education decided to extend the free semester into an entire school year.¹⁵⁹ In addition, the South Korean curriculum for both primary and middle schools includes “Creative Experiential Learning Activities”, which are hands-on activities, such as participation in clubs, volunteering and career exploration. According to the 2015 national curriculum, Creative Experiential Learning amounts for approximately 10% or more of the total lesson hours.¹⁶⁰

Flipside training programme

Flipside is a twelve-week, agency-led, digital product-design training programme aimed at giving diverse young East Londoners the chance to break into the digital industry through a combination of hands-on experience and classroom learning. The programme is led by leading digital agencies and was designed by Skills Lab with a key focus on developing broader competencies, skills and mindsets.

The training programme includes:

- Live group projects to build their portfolios
- A rotating programme with multiple agencies to learn and network with
- A guaranteed interview for several paid placements for those who complete the course
- An industry mentor to support you in achieving your goals
- A training bursary of £200 per week to cover travel, food expenses and a bit extra for the duration of training (up to £2500 for the duration).

Of the first twelve participants in the programme in 2018, ten have gone on to full-time careers in the sector, which is being repeated in 2019.¹⁶¹

MAMA Youth Project

The MAMA Youth Project’s mission is to combat the misrepresentation of people from under-represented groups. It does this by recruiting, training and nurturing young people between 18-25 years of age from under-represented groups or with limited educational or employment opportunities. Through training projects, they equip people with the skills and experience necessary to secure long-term, fulfilling employment in the TV and media industry. Their particular focus is on young people with limited educational or employment opportunities, but it also includes unemployed graduates.

As with Flipside, trainees receive a monthly stipend to complete the course (£311 per week for ten weeks),¹⁶² and the training is focused on giving young people hands-on experience of working in the screen industries.

To date, they have trained 468 young people, of whom 90% were in sustained employment a year after training.





Recommendations

Policy makers need to stop looking to the past for inspiration. As the work by Scharmer and Schleicher suggests, pedagogies that focus on learning from the past can no longer be expected to adequately prepare young people for the future world of work. We cannot continue to teach students the same information in the same way and expect different answers to the significant challenges facing the world.

Schools should be encouraged to approach the curriculum with fresh eyes. As a growing body of evidence mounts surrounding the success of new pedagogies, so does the number of influential voices arguing for the substantiated need to nurture capabilities beyond knowledge in our young people.

Working as a community, we can ensure all young people get the experience they need. Groups of cultural partners, schools and employers, along with public bodies, can jointly provide mentoring, advice, work experience and bespoke training schemes to ensure every child and young person gets the support they need to find the right path for them. This will take the burden off the education system to work in such a complex ecology on its own.

Employers need to be more ambitious in who and how they recruit talent. With many employers dissatisfied with the skills of university graduates, it is time for employers to think more expansively in regard to how and who they recruit.

Conclusion

On the surface, debates surrounding how we educate young people may seem unrelated to discussions around diversity in the workplace and our collective culture. However, there is a core similarity between the two discussions: that in order to "do well", the onus is on young people to adopt the norms of the pre-established elite, which they can only hope to change once they have climbed high enough. There are clear parallels with this approach across the creative industries in how public funding is spent and careers are accessed. In order to secure a job in the arts, you need to be connected to people in the industry, talk the same language and share similar values. This leaves many creative jobs fundamentally inaccessible to a great deal of young people, and has created a culture that encourages exploitative and exclusive working practices that only the wealthy can afford to navigate. However, the alternative scenario, which would put the entire onus on policy makers and businesses to adapt their mindsets, presents its own challenges; it suggests their carefully curated knowledge and experience is no longer as valued. The only way to change this is for the creative industries and young people to have much better exposure to each other, to create a shared understanding of how each other operate.

There are examples of where this is being achieved. Programmes such as Mama Youth and Flipside prove that informal training programmes work and are valuable for both young people and creative businesses. Similarly, some of the Mayor's strategies, such as the Creative Enterprise Zones, Careers Clusters and the Creative Land Trust, make attempts to improve pathways into the creative industries. However, what is missing, and desperately needed, is a more coordinated approach across both London and its industries that will achieve impact at a bigger scale.

To make a significant impact, we need policy makers, educators and creative businesses to develop a shared vision and sense of responsibility for the future growth of their industries. This means taking a long-term and systemic approach with a focus on inclusion as much as on growth. This will help to create sector-wide agreements on what is to be achieved, leading to rapid and more wide-reaching change.

Figures

Figure 1: The percentage of creative employment across global cities	9
Figure 2: The likelihood of a company's financial performance being above the median according to the predetermined characteristics of its executive staff	10
Figure 3: The percentage of disabled people working across the arts	11
Figure 4: Intentions of start-up founders following the Brexit referendum	12
Figure 5: Top destinations for international movers into the European tech ecosystem 2018	13
Figure 6: Top destinations for international movers into the European tech ecosystem 2017	13
Figure 7: Primary concerns of those working in the screen industries (quarterly barometer)	14
Figure 8: Possible government interventions across the value chain	14
Figure 9: Percentage growth in creative jobs and businesses (2011-2014 and 2015-2016)	19
Figure 10: Net growth in the number of creative jobs and businesses (2011-2014 and 2015-2016)	19
Figure 11: Rank of income deprivation affecting children by London borough, comparing all English local authorities (2015)	20
Figure 12: Percentage of population that is BAME by London borough compared with the number of people employed as managers, directors or senior officials	21
Figure 13: The percentage of working-class people working in different creative industries	22
Figure 14: What graduates earn the most? Median annual earnings (£) by subject, five years after graduating	23
Figure 15: The percentage of students of different ethnicities on Higher Education arts courses in the UK (2014-2015)	24
Figure 16: The likelihood of increase in job demand organised by sector	34
Figure 17: The probability of computerisation of jobs in the UK organised by sector	35
Figure 18: A ranking, by Pearson correlation, of the importance of O*NET variables to future demand for UK occupations	36
Figure 19: A ranking, by Pearson correlation, of the importance of O*NET variables to future demand for US occupations	37
Figure 20: Projections of 4-digit SOC occupation growth based on two principal components: creativity and management skill	38
Figure 21: Intention theory (Scharmer, 2016)	40
Figure 22: School 21 performance (2018) compared to the national average	43

Endnotes

- 1 Newbigin, J. (2010). *The Creative Economy: An Introductory Guide*. [ebook] London: British Council, p.15. Available at: https://creativeeconomy.britishcouncil.org/media/uploads/files/English_GuideToolkit_30_withCover_LR.pdf [Accessed 11 Nov. 2018]
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