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Understanding growth in the creative industries: National trends and firm-level evidence from Creative UK

Burcu Sevde Selvi

Author
Burcu Sevde Selvi, Bennett School of Public Policy

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Forword

Despite being one of the Government's eight key Industrial Strategy sectors, the creative industries in the United Kingdom (UK) remain one of the least well appreciated segments of our economy. In 2023, the sector generated £124 billion in Gross Value Added (GVA), amounting to 5.2% of UK GVA, driving innovation and exports. At the same time the sector's reliance on intangible assets and short term, project-based work means that many potentially high growth firms struggle to access the finance required for scaling up. A problem for many UK start-ups, this is all the harder for creative sector firms.

This report proposes that better data and targeted investment are essential to unlocking the sector's full potential. It examines the dynamics and geography of growth. By combining official statistics with a granular analysis of Creative UK's Creative Growth Finance (CGF) portfolio, we provide evidence that targeted finance could bridge market gaps. What's more, such investment would be particularly effective in supporting firms outside London and the South East, fostering more geographically inclusive growth at the same time as leveraging private capital.

The report also explores the transformative pressures of artificial intelligence (AI) and digitalisation. While these tools offer immense opportunities for content enhancement, they also demand a robust policy response to protect intellectual property and address labour precarity – as we argued in a previous policy report on copyright and the creative industries.[1]

All previous UK governments that introduced an industrial strategy recognised the sector's economic as well as cultural and civic importance. As the UK implements its current Modern Industrial Strategy (2025), this report offers a useful evidence base for policymakers. It makes the case for a coordinated approach aligning finance, skills development, and a place-based intelligence. By treating the creative industries as a strategic driver of systemic innovation, with spillovers for other parts of the economy, policymakers can ensure the UK remains at the forefront of the global creative economy, and that this economically important sector continues to contribute to national economic growth.

Diane Coyle
Bennett Professor of Public Policy, and Research Director
Bennett School of Public Policy, University of Cambridge

[1] Glenster, A.K. et al. (2025). *Policy Brief: AI, Copyright, and Productivity in the Creative Industries*. Minderoo Centre for Technology & Democracy.

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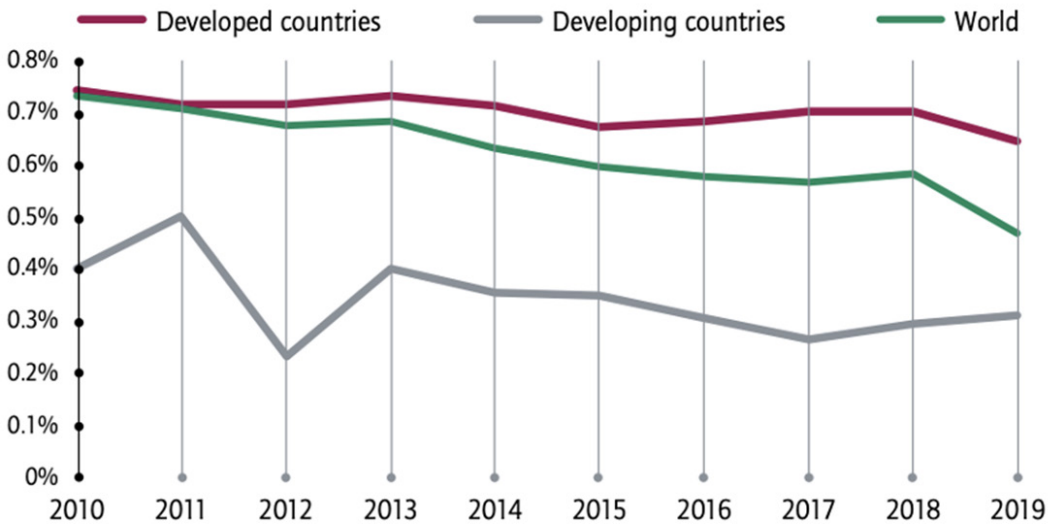
1. Introduction

The creative industries play a growing role in the UK economy. They contribute to innovation, exports and local growth, support jobs across a wide range of occupations and places, and shape how people experience culture, information and everyday life. In 2023, the sector generated £124 billion in Gross Value Added (GVA), around 5.2% of total UK GVA (Department for Culture, Media & Sport (DCMS), 2025a).[2] At the same time, they remain heavily reliant on intangible assets, project-based work and complex supply chains that are not always well captured by standard measurements, making policy for the sector challenging.

Nevertheless, since the late 1990s, research and policy have recognised creative and cultural industries as important drivers of productivity and innovation in the UK economy and elsewhere (DCMS, 1998; Organisation for Economic Co-operation and Development (OECD), 2022; Frontier Economics, 2023; Department for Business & Trade (DBT) and DCMS, 2025). Yet public investment and institutional attention have not kept pace. For example, Creative UK has argued that, despite the sector's strong GVA and export profile, the creative economy remains structurally undercapitalised and lacks patient, mission-led finance, and has proposed a model that would use public interventions to crowd in private capital and support long-term growth (Norbury and Tarr, 2025). This point extends beyond the UK: across many economies, public spending on cultural and creative activity has been falling. For example, cross-country evidence shows a steady decline in government spending on "cultural services" and on "broadcasting and publishing services" as a share of GDP between 2010 and 2019 (United Nations Educational, Scientific and Cultural Organization (UNESCO), 2022) (Figure 1). This gap between the sector's economic weight and the resources devoted to it is one of the starting points for this report.

Figure 1. Mean government expenditure on 'cultural services' and 'broadcasting and publishing services' as a percentage of GDP, 2010–2019



*Only countries having submitted data for at least 5 years in the period between 2000 and 2019 have been considered.

Source: UNESCO (2022), based on data from International Monetary Fund (2020) and BOP Consulting (2021).

[2] DCMS provisional estimates suggest the creative industries generated £145.8bn in GVA in 2024, equivalent to 5.5% of UK GVA (DCMS, 2026).

The UK's Modern Industrial Strategy (2025) responds to this gap by setting out a ten-year approach to raising business investment and supporting growth in priority sectors, including the creative industries. As part of this wider framework, the Creative Industries Sector Plan (2025) identifies four main areas of action: improving cross-sector support for innovation, finance, skills and exports; supporting high-growth sub-sectors including film and television, music and the performing and visual arts, video games, and advertising; strengthening creative clusters across the UK; and deepening collaboration between government and industry, including through the relaunched Creative Industries Council. The Plan also has a clear place-based element, including the £150 million Creative Places Growth Fund for six Mayoral Strategic Authorities, alongside wider work with local leaders and devolved governments across 12 creative clusters.[3] These measures form part of the Plan's wider ambition to raise annual business investment in creative organisations from £17 billion to £31 billion by 2035 (DBT and DCMS, 2025).

The sector's scale is also visible in employment, with the creative industries supporting around 2.4 million jobs in the year from July 2023 to June 2024 (DCMS, 2024). Yet the sector's economic contribution, including GVA and employment, is unevenly distributed across subsectors and places. Official statistics and previous mapping work show that high-value subsectors, including IT, software and computer services, advertising and marketing, and film, are particularly concentrated in London and the South East, while other regions show thinner but still important patterns of creative activity (DCMS, 2025a; Siepel, Ramirez-Guerra and Rathi, 2025).

Creative UK, formerly named Creative England, provides one illustration of what specialist, mission-driven finance can achieve. Between 2012 and 2017, its investment programme deployed nearly £20 million to around 350 businesses, with around 81% of this finance going to firms outside London and the South East. Evaluations highlight high three-year survival rates, over 1,100 jobs created or safeguarded, and an estimated £4 of external capital mobilised for every £1 of public investment, suggesting that specialist, mission-driven finance can support inclusive growth and leverage private funds at the same time (Creative England, 2018).

The sector's importance is not limited to its direct contribution to GVA and employment. Creative activity is closely connected to wider innovation processes, with evidence that ideas, skills and practices developed in creative industries can spill over into other parts of the economy (Frontier Economics, 2023). These links are particularly visible in creative services and knowledge-intensive activities such as design, advertising, digital content and screen-related production, which connect cultural production with business innovation, branding and trade (Casadei, Vanino and Lee, 2023). At the local level, creative clusters can generate multiplier effects in surrounding urban economies, particularly through non-tradable employment linked to local spending, although these effects are uneven and stronger in larger creative clusters (Gutierrez-Posada et al., 2023). More broadly, cultural and creative activity can also support tourism, local identity and social value (OECD, 2022). The sector also has an international dimension, with the UK ranked second globally, after the US, for creative foreign direct investment projects (Jones et al., 2024).

At the same time, these strengths sit alongside persistent weaknesses in creative labour markets. Insecurity, unequal access and the undervaluation of creative work have long been recognised as structural issues in the sector, particularly for workers without strong financial, social or professional networks (Banks and Hesmondhalgh, 2009; Brook, O'Brien and Taylor, 2020; Cateridge, Smith and Yelin, 2024). Digital technologies and AI are adding further complexity by reshaping how creative content is produced, distributed and monetised, while leaving open who benefits from these changes and under what conditions (Coldicutt, Williams and Barron, 2023; Anantrasirichai and Bull, 2022; Lee, 2022). Generative AI has made copyright particularly contentious. Glenster et al. (2025), for instance, emphasise the need for licensing arrangements and clearer disclosure of training-data provenance, and caution that opt-out approaches to text and data mining may shift too much of the burden onto rights holders.

[3] The 12 creative clusters identified in the Creative Industries Sector Plan are: Dundee; Edinburgh City Region; Glasgow City Region; North East; Belfast City Region–Derry/Londonderry; West Yorkshire; Greater Manchester; Liverpool City Region; West Midlands; Greater London; Cardiff City Region; and West of England.

Responding to such intersecting challenges, Coyle and Alayande (2024) argue for an industrial policy that is coordinated, data-informed, and sensitive to place. This argument is directly relevant to the creative industries, where uneven geography and the structural challenges outlined above point to the need for investment approaches that do more than address market gaps. This report therefore treats creative sector investment not only as a response to finance gaps, but also as a way to strengthen supply-side capabilities, deepen clusters and support diffusion. Because creative industries can generate wider spillovers through networks, cross-sector linkages and the movement of skills and ideas, understanding where these connections are strongest can help inform more targeted and inclusive policy (Chapain et al., 2010; Mateos-Garcia, Klinger and Stathoulopoulos, 2018). The Creative UK case study discussed later in the report is used in this spirit: not as a comprehensive impact evaluation, but as an illustration of how specialist finance can interact with regional and sectoral patterns of activity.

Building on this framing, the report has two aims. The first is analytical: to examine how different definitions and classifications, from Standard Industrial Classification (SIC) codes to creative-intensity measures, shape what can be seen in the data on the creative industries. It brings together national, regional and firm-level evidence to build a richer picture of output, employment and productivity. The second aim is policy-focused and exploratory: to use this evidence, alongside a small firm-level analysis of Creative UK's Creative Growth Finance (CGF) portfolio and its emerging Creative Equity Fund proposal, to reflect on the UK's evolving industrial strategy for the creative industries, including the roles of finance, skills, innovation and place-based interventions.

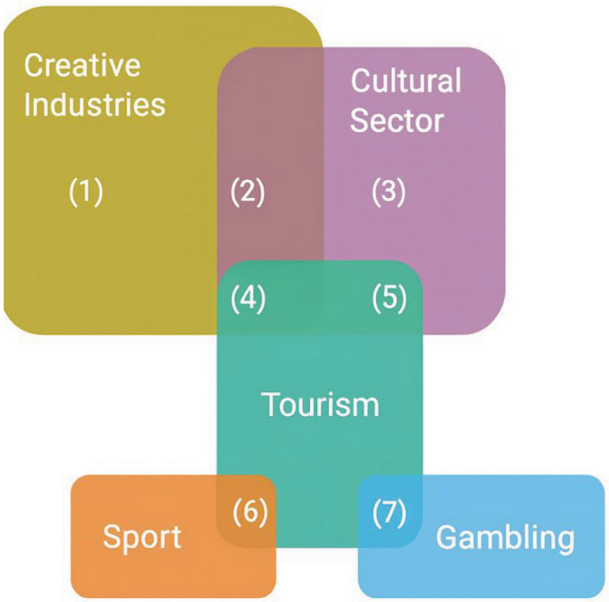
Section 2 begins by asking what we mean by 'creative industries' and how competing definitions reflect different policy and analytical priorities. It then examines how the sector is measured in practice, focusing on SIC-based classifications, creative-intensity approaches and their limits for understanding productivity and geography. This underlines the data challenge for a sector that is one of the eight identified by the Industrial Strategy as key for UK economic growth. Section 3 turns to the UK policy landscape and economic evidence. Section 4 presents a firm-level case study of Creative UK's CGF portfolio to explore how specialist finance interacts with regional and sectoral patterns of activity. Section 5 considers transformation in the creative economy, particularly innovation, AI and changing working practices. The report concludes by bringing these strands together and setting out implications for industrial strategy, finance and place-based support.

2. What do we mean by 'creative industries' and how are they measured?

2.1 Defining the creative industries

The creative industries are frequently confused or merged with cultural, tourism, sport and gambling sectors, reflecting overlapping boundaries in policy and statistics. Figure 2 provides a simplified view of how these sectors intersect. These categories are built from Standard Industrial Classification (SIC 2007) codes, which is why they can overlap in practice (DCMS, 2025b).

Figure 2. Overlap of SIC codes for Creative Industries



1. Publishing, computer games, software publishing, computer programming, computer consultancy activities
2. Film, TV, Music, Radio
3. Retail of music and video recordings, manufacture of musical instruments, reproduction of recorded media
4. Arts, Museum activities
5. Operation of historical sites and similar visitor attractions
6. Renting of sports goods, operation of sports facilities, other sport activities
7. Gambling

Note: Civil Society has not been depicted in this figure because it spans across all industries, both within DCMS sectors and outside. The overlap between Civil Society and other DCMS sectors is taken into account for All DCMS totals, mainly SIC 90 – Arts, which overlaps with Creative Industries, Cultural Sector and Tourism.

Source: DCMS (2025b).

Beyond statistical classification, the category of the creative industries was also shaped through policy. It was not simply a descriptive label for a set of activities, but a way of making cultural and creative work legible as part of the economy. Gross (2020) shows that the UK's use of the term was closely linked to the 1998 Creative Industries Mapping Document, where an intellectual-property-based definition was developed through a relatively informal process. That definition has remained influential, but it has also generated debate about what should be included in the sector and how its value should be measured. The Mapping Document described the creative industries as activities based on individual creativity, skill and talent, with the capacity to create wealth and employment through intellectual property (DCMS, 1998). Chris Smith, then Secretary of State for Culture, Media and Sport, later recalled that he had "sort of dreamed it up", highlighting the pragmatic and strategic nature of the definition and its role in presenting creativity as part of a growth agenda (Gross, 2020).

A major critique concerns the policy shift from "cultural industries" to "creative industries". Hesmondhalgh (2007) argues that this shift brought cultural policy closer to market-oriented ideas of growth and competitiveness. Galloway and Dunlop (2007) similarly argue that official definitions can blur the relationship between culture and creativity, making it harder to account for cultural value that is not easily expressed in market terms. O'Connor (2024) develops this critique further, suggesting that when culture is treated primarily as an industry, its civic, democratic and social roles can become secondary to its contribution to economic output.

International organisations define the field in different ways, often reflecting the policy questions they are trying to answer. UNCTAD frames the creative industries through the cycle of creating, producing and distributing goods and services that rely on creativity and intellectual capital as core inputs, and links the creative economy to trade, employment, innovation and inclusive development (UNCTAD, 2008; UNCTAD, 2022). The European Commission and the OECD generally use the broader language of cultural and creative sectors (CCS), covering activities based on cultural values and artistic or other forms of creative expression, including both market and non-market activity (European Commission, 2021; OECD, 2022). UNESCO uses a cultural-cycle model, which follows cultural and artistic content through stages of creation, production, dissemination, exhibition, transmission and consumption. Its updated Framework for Cultural Statistics also responds to digitalisation and the role of culture in sustainable development (UNESCO, 2009; UNESCO, 2025).These differences show that definitions are not purely technical: they are shaped by whether the main policy focus is culture, trade, innovation, development or measurement.

Moving beyond definitional debates, Potts and Cunningham (2008) examine how the creative industries relate to the wider economy. They set out four models: welfare, competition, growth and innovation.

Table 1. Four policy lenses on the economic role of the creative industries

Model	Core idea	Economic reading	Policy lens
Welfare	Creative industries are valued for their cultural and social contribution, but some activities may struggle to cover their costs through market income alone	Their value is partly non-market, so commercial returns may understate their wider public benefit	Public support can be justified where cultural value would otherwise be underprovided
Competition	Creative industries are treated as comparable to other sectors operating in competitive markets	Their contribution is not assumed to be more or less dynamic than that of other industries	Policy should provide consistent sectoral treatment rather than exceptional support
Growth	Creative industries contribute to wider economic growth by generating ideas, services and demand that can benefit other sectors	Expansion of creative activity can support growth beyond the sector itself, including through new markets and the adoption of technologies	Investment can be justified where creative industries strengthen wider growth and productivity
Innovation	Creative industries are part of the wider system through which knowledge, technologies and business models develop and circulate	Their significance lies in supporting structural change, experimentation and the spread of new ideas across the economy	Policy should treat creative industries as contributors to innovation, knowledge diffusion and economic adaptation

Source: Author's synthesis based on Potts and Cunningham (2008).

Potts and Cunningham's (2008) empirical discussion gives most support to the growth model, while also stressing that no single model applies uniformly across places, sub-sectors or periods. Their innovation model is especially useful for this report because it treats the creative industries not only as a discrete sector, but also as part of the wider system through which ideas, knowledge and technologies circulate. More recent UK-focused studies provide evidence on some of these mechanisms, including knowledge spillovers from creative firms to wider business innovation (Frontier Economics, 2023) and patterns of relatedness between creative services, regional specialisation and trade (Casadei, Vanino and Lee, 2023). A related contribution by Potts et al. (2008) also describes parts of the creative economy as "social network markets", where networks, reputation and attention help coordinate activity under conditions of novelty and uncertainty.

This systems perspective is also consistent with UK mapping evidence. Mateos-Garcia, Klinger and Stathoulopoulos (2018) show that creative activity is not confined to London and the South East, but is distributed across a range of cities and local economies, including places such as Dundee, Manchester, Cardiff, Glasgow and Edinburgh. Siepel et al. (2020) develop this picture further by identifying 709 creative microclusters across the UK, including 247 outside the 47 larger creative clusters identified in earlier research. This reinforces the case for approaches that are sensitive to local industrial structure, networks and capabilities.

This evidence has implications for how creative industries policy is designed. Coyle and Alayande (2024) argue that the UK has often pursued sectoral industrial policy by accident rather than by design, through a changing mix of interventions, regulations and institutional arrangements that have not always been connected by a clear long-term strategy. They make the case for a more deliberate approach, with stronger coordination across policy tools and institutions. This sits within a broader international reappraisal of industrial policy, in which recent work emphasises the importance of evidence, coordination, experimentation and institutional learning (Juhász, Lane and Rodrik, 2024). For the creative industries, this points towards treating the sector as part of the UK's wider productivity and innovation agenda, rather than as a set of disconnected cultural or sectoral initiatives.

Taken together, these debates show that definitions of the creative industries are shaped by different institutional priorities, whether cultural, economic or innovation-oriented. These choices matter because they influence how the sector is measured, which forms of value are made visible, and what kinds of policy intervention appear justified.

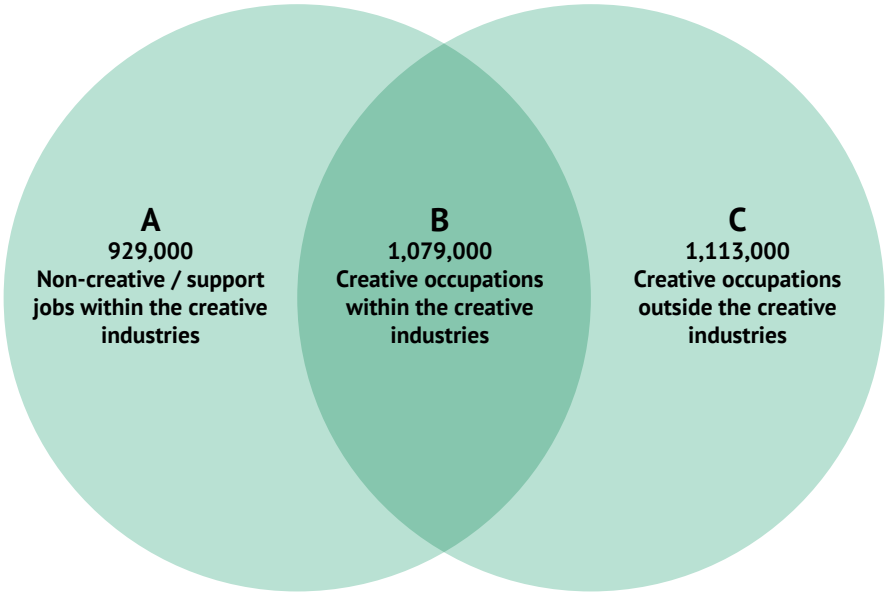
2.2 Classifying the creative industries: creative intensity and measurement limits

In the UK, the official classification of the creative industries combines industry categories with data on creative occupations. Early work on the Creative Trident framework showed that creative activity could not be captured only by looking at firms in traditionally cultural sectors, because creative workers are also embedded across the wider economy (Higgs, Cunningham and Bakhshi, 2008). Building on this, Bakhshi, Freeman and Higgs (2013) refined the creative-intensity approach, which assesses the share of creative occupations within each industry. DCMS later formalised this approach in its methodology guidance, using four-digit SIC 2007 classes and considering industries with more than 6,000 jobs and creative intensity above 30% for inclusion, with borderline cases reviewed through consultation (DCMS, 2016).

This method has important strengths. It recognises that creative labour is distributed across the wider economy and gives policymakers a more systematic basis for deciding which industries should be included. However, it also has limitations. Bakhshi, Freeman and Higgs (2013) argue that earlier DCMS classifications contained inconsistencies: some industries with high concentrations of creative employment were excluded, while some lower-intensity activities remained within the official list. Their work also shows that classification involves judgement, especially for activities close to the threshold, rather than being a purely mechanical exercise.

Figure 3. Employment in the UK creative economy, 2017

Creative industries = A+B
Creative economy = A+B+C



Source: Greater London Authority (2019).

More recently, Lyons and Connolly (2024) show that the creative industries are still only imperfectly captured in national accounts. DCMS definitions operate at a detailed four-digit SIC level, but input-output tables are usually organised at a more aggregated level. As a result, some creative activities are folded into broader categories, while other categories contain only a small creative component. They propose multi-regional creative industries satellite accounts (MR-CISA) as a way to improve understanding of the sector's regional footprint and its direct and indirect links with other parts of the economy.

Classification challenges also arise in international comparison. Although UK SIC, European NACE and international ISIC classifications are related, they do not always map neatly onto each other, especially for fast-changing and IP-intensive activities such as streaming, video games and design services. These mismatches can make cross-country comparison difficult and may lead some activities to be over- or under-counted.

Data from the Creative Supply Chains Study show that creative employment extends well beyond the industries captured by creative SIC codes. Drawing on DCMS Sectors Economic Estimates 2017, the study estimates UK creative economy employment at around 3.12 million jobs. This includes approximately 1.08 million creative occupations within the creative industries, around 929,000 non-creative or support roles within creative industries, and just over 1.1 million creative occupations located outside creative-industry SIC classes (Greater London Authority, 2019).

These numbers illustrate that a large share of creative employment sits outside the SIC codes officially defined as creative industries. They also show why SIC classifications alone cannot fully reflect where creative skills are used or how creative activity is organised in practice.

The same study also shows that these measurement issues have policy implications. London's creative industries are estimated to spend around £40 billion a year through their supply chains, with about half of this expenditure going to businesses outside the creative sectors. The case studies also show that London-based creative organisations draw on suppliers across the UK, demonstrating that the economic effects of creative activity are not confined to the places where cultural consumption or production is most visible (Greater London Authority, 2019). Policies focused only on the 'core' creative industries, therefore risk missing the wider networks of firms, workers and places that support creative production.

From an analytical perspective, headline SIC categories are a necessary starting point, but they do not fully capture the structure of the creative economy. A fuller picture requires combining industry classifications with evidence on occupations, supply chains, regions and firm-level dynamics. The ONS indicators examined in the next chapter provide part of this picture by showing broad economic trends and the relative scale of creative activity within the UK economy. They do not, however, show how individual creative businesses perform or how firms vary in their financial and organisational characteristics. For this reason, later sections draw on Creative UK's investment data to complement the ONS analysis and to provide a more granular view of firm-level dynamics.

3. Evidence and spatial policy framework for the UK creative industries

3.1 The evolution of UK creative industries policy

The term 'creative industries' entered UK policy vocabulary in 1998, when DCMS published the first Creative Industries Mapping Document (DCMS, 1998). The document brought activities such as film, music, design, advertising and software under a shared policy category, using a definition centred on individual creativity, skill, talent and the potential to generate wealth and employment through intellectual property. By the late 1990s, particularly under New Labour, this framing had become part of a wider policy agenda concerned with economic modernisation, urban regeneration and the visibility of cultural and creative work as a source of economic value (Gross, 2020; Swords and Prescott, 2023).

Several policy shifts in the 1990s helped create the conditions for this agenda. The Broadcasting Act 1990 required public service broadcasters to commission a minimum share of qualifying output from independent producers, opening up more sustained opportunities for independent production. The launch of the National Lottery in 1994 created a new funding stream for arts, heritage and film-related activity. In 1997, the incoming Labour government established the Creative Industries Task Force, giving the sector a more visible institutional place within government and helping to consolidate the idea of the creative industries as both an economic and cultural policy concern (Gross, 2020).

During the 2000s and 2010s, policy support became more targeted, particularly through fiscal incentives and industry-facing institutions. Film Tax Relief, introduced in 2007, provided a more stable incentive framework for qualifying British film production. Further reliefs followed, including High-End Television Tax Relief from 2013 and Video Games Tax Relief from 2014, broadening support across screen and interactive media (His Majesty's Revenue and Customs (HMRC), 2021). The Creative Industries Council, established in 2011, created a joint government–industry forum focused on issues such as access to finance, skills, exports, innovation and intellectual property. In 2018, ScreenSkills was created from Creative Skillset as the skills body for the UK screen industries (ScreenSkills, 2024).

However, while these developments widened the institutional and policy architecture around the creative industries, the broader literature suggests that UK creative industries policy has often remained more reactive than strategic. Accounts of New Labour cultural policy show how the creative industries agenda was shaped by economic modernisation, urban regeneration and changing relationships between culture and economy, while later critiques point to continuing problems of coordination, economic instrumentalism and fragmented policy design (Hesmondhalgh, Oakley, Lee and Nisbett, 2015; Swords and Prescott, 2023; O'Connor, 2024; Coyle and Alayande, 2024). The House of Lords Communications and Digital Committee (2023) similarly highlights weaknesses around access to finance, R&D incentives, skills, intellectual property and cross-government coordination. Recent scholarship also shows that policy has been slower to address insecure work, unequal access and uneven career progression within the sector (Brook, O'Brien and Taylor, 2020; Carey, Giles and O'Brien, 2023).

3.2 Contribution to the economy

The creative industries are often discussed as a single part of the economy, but they bring together a wide range of activities with different business models, labour markets and productivity profiles. Looking across sub-sectors helps show where economic value, employment and measured productivity are concentrated, and where standard economic indicators may understate wider cultural and social contributions.

Table 2 shows the variation across DCMS creative-industries sub-sectors in terms of GVA, employment and output per hour.[4] The figures underline the heterogeneity of the sector. IT, software and computer services is the largest sub-sector by scale, accounting for close to 40% of total creative-industries GVA and just over two-fifths of creative jobs.

[4] This table uses 2023 as the main reference year, drawing on the latest available DCMS estimates for GVA, employment and productivity. Where datasets use slightly different reference periods, the closest available estimate is used to maintain comparability across indicators.

However, its output per hour, at £28, sits below both the UK average of £40 and the creative-industries average of £31. By contrast, the highest measured productivity is found in film, TV, radio and photography (£47 per hour) and advertising and marketing (£46 per hour), both of which sit above the UK average and represent knowledge-intensive, high-value activities within the sector.

Table 2. Descriptive statistics for the creative industries, 2023

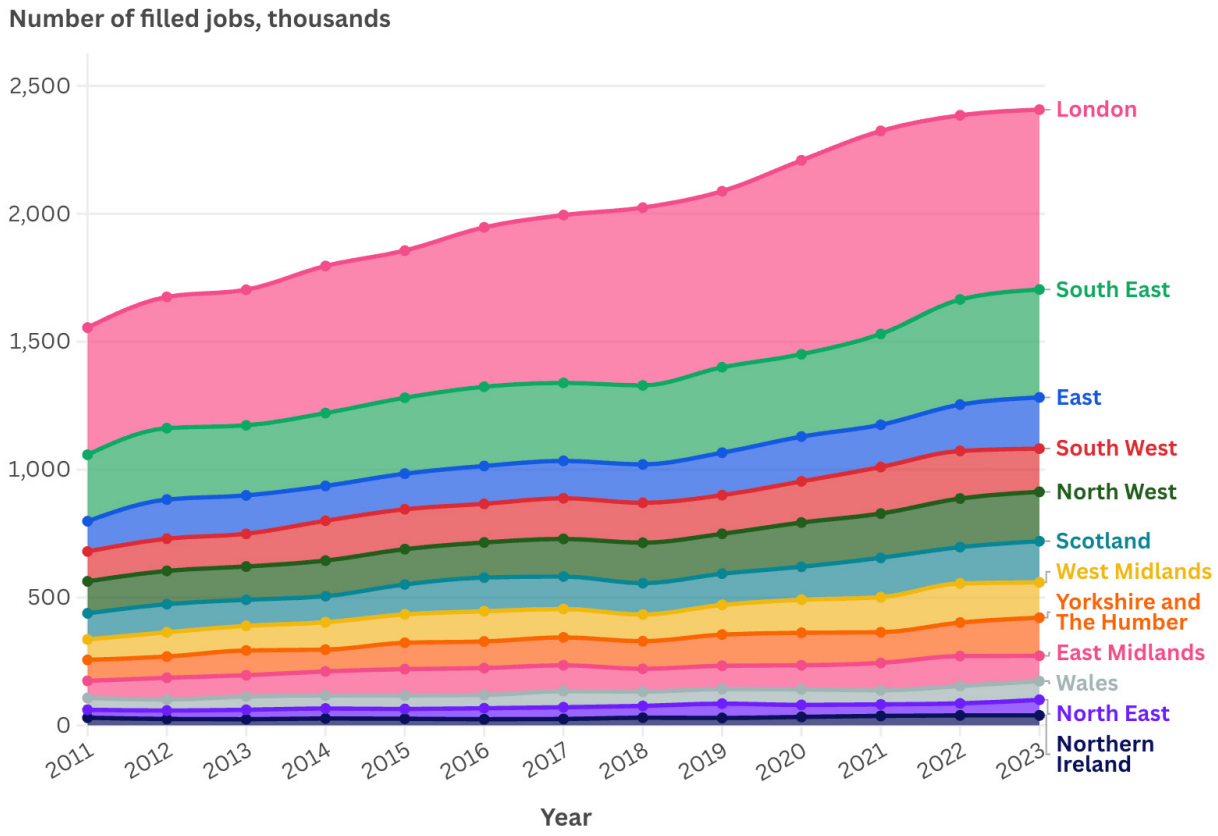
Subsector	GVA (£bn)	% of CI GVA	Filled jobs (thousands)	% of CI jobs	Output/hr £
IT, software & computer services	49.1	39.6%	1,022	42.6%	33
Advertising & marketing	21.5	17.3%	260	10.8%	53
Film, TV, radio & photography	21.2	17.1%	256	10.7%	49
Publishing	11.6	9.4%	187	7.8%	47
Music, performing & visual arts	11.2	9.1%	311	13.0%	30
Architecture	4.0	3.2%	122	5.1%	24
Design & designer fashion	3.9	3.1%	140	5.8%	19
Museums, galleries & libraries	1.1	0.9%	91	3.8%	9
Crafts	0.4	0.3%	10	0.4%	28

Source: GVA figures from DCMS (2025a) DCMS Economic Estimates: GVA 2023 (provisional); employment figures from DCMS (2024) Economic Estimates: Employment in DCMS sectors, July 2023 to June 2024; output per hour from DCMS (2025c) DCMS Sectors Economic Estimates: Productivity 2023 (provisional).

Other sub-sectors, including crafts and museums, galleries and libraries, account for a much smaller share of both GVA and employment and have lower measured output per hour. The £8 per hour figure for museums, galleries and libraries should be interpreted with caution, as GVA does not fully capture the wider social, educational and cultural value generated by free-to-access cultural services (DCMS, 2025b). Overall, Table 2 points to a dual challenge: a small number of high-productivity sub-sectors make a strong contribution to aggregate performance, while other socially and culturally significant areas appear more fragile when assessed through standard economic measures. This suggests the need for differentiated policy approaches that support growth in high-value sub-sectors while strengthening resilience in areas whose full contribution is not well captured by GVA.

The geography of creative activity also matters. Creative jobs and GVA are not distributed evenly across the UK, and regional analysis helps distinguish between where creative activity is largest in absolute terms and where creative industries make up a larger share of the regional economy. The following figures therefore move from the sub-sector level to the regional level, examining creative employment, creative GVA, and creative GVA as a share of total regional GVA.

Figure 4. Total creative industries employment by region and devolved nations



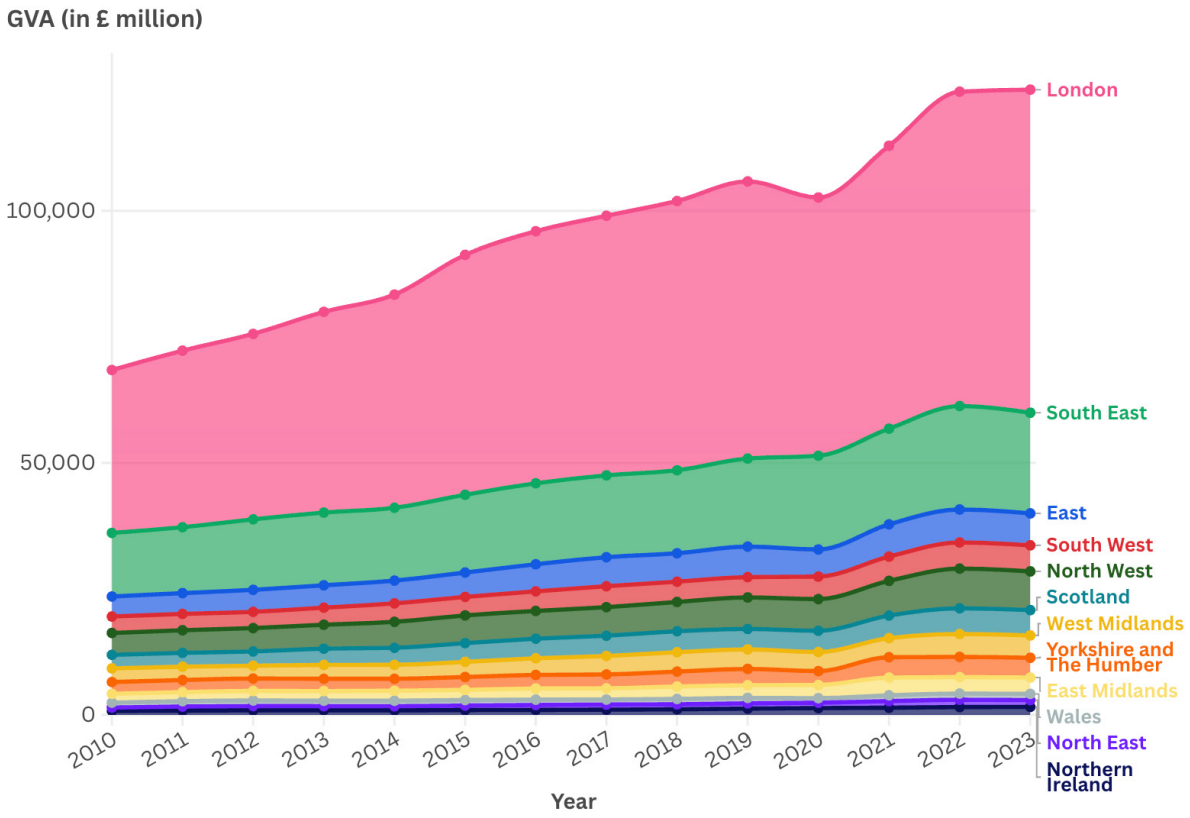
Source: Authors' elaboration using DCMS (2025d) Economic Estimates: DCMS Sectors Employment, January to December, 2011 to 2024. Visualisation created with flourish.studio.

Figure 4 presents creative industries employment by UK nation and region from 2011 to 2023. The headline UK totals show strong and sustained growth: total UK creative industries filled jobs rose from approximately 1.56 million in 2011 to around 2.42 million in 2023, an increase of roughly 55% over the period.[5] Over the same period, total UK filled jobs grew by around 13%, meaning that creative industries employment expanded considerably faster than the wider workforce. The share of UK filled jobs in the creative industries rose from 5.2% in 2011 to 7.1% in 2023.

The employment series also suggests continued growth through the pandemic period. While other DCMS sectors, including tourism, sport and gambling, recorded employment falls in 2020, creative industries employment continued to increase, growing by around 6% that year (DCMS, 2024). Spatially, London and the South East account for the largest shares of creative employment throughout the period, while most other regions and devolved nations also show gradual growth over time. However, the concentration is less pronounced in employment than in creative GVA. London and the South East together account for around 47% of UK creative jobs in 2023, compared with a substantially larger share of creative industries GVA. This suggests that creative employment is more geographically distributed across the UK than the economic value generated by the sector.

[5] The UK headline totals, total UK filled jobs and creative industries' share of UK filled jobs are calculated from the same DCMS employment dataset.

Figure 5. Creative industries GVA by region and devolved nation[6]



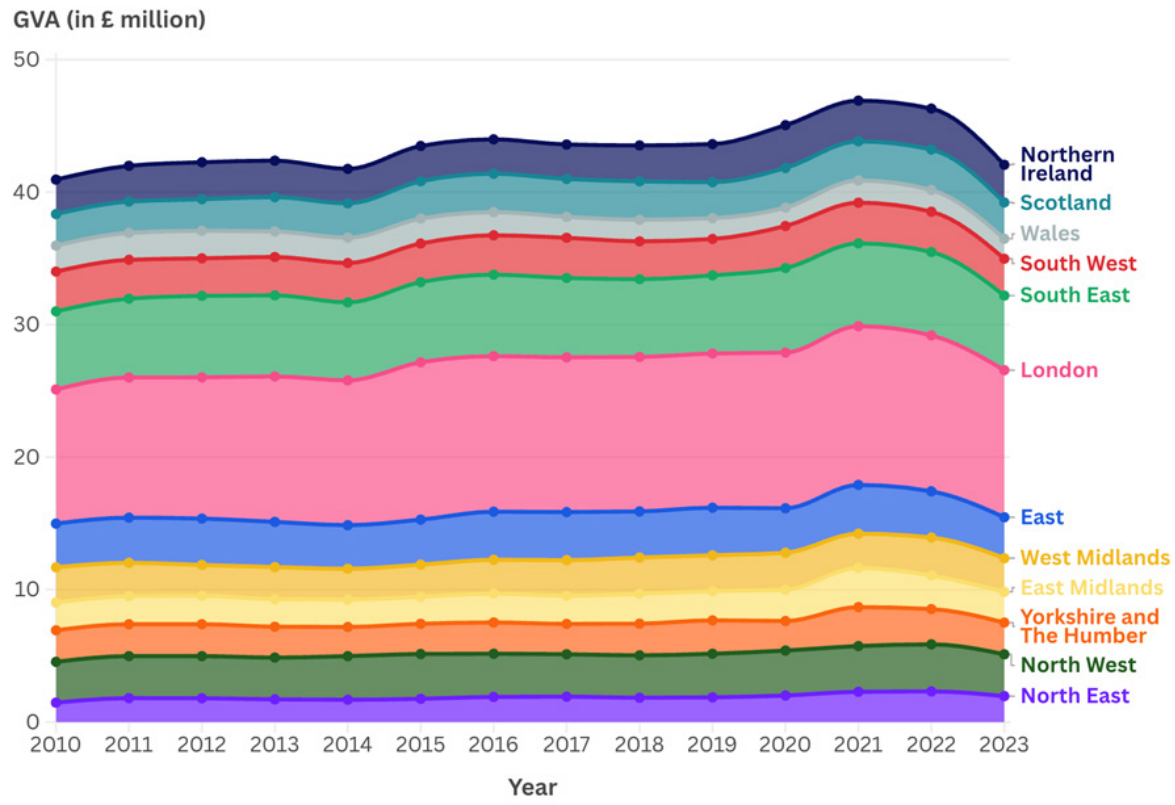
Source: Author's elaboration using DCMS (2025e) DCMS Sectors Economic Estimates: Regional GVA 2023.
Visualisation created with flourish.studio.

Figure 5 shows creative industries GVA in current prices by UK nation and region between 2010 and 2023. It shows steady nominal growth alongside a highly uneven spatial distribution. London accounts for the largest share of creative industries GVA throughout the period and pulls further ahead over time, with creative GVA in the capital rising from around £32 billion in 2010 to approximately £64 billion in 2023, almost doubling in nominal terms. The South East and the East of England form the next largest regional contributions, and together with London account for the majority of UK creative industries GVA across the period. Other regions and devolved nations also grow in absolute terms, but from a much smaller base.

Two patterns are visible at once. Creative GVA has grown across most regions, but the geography of value creation remains strongly concentrated in and around London. This means that regional growth has not, so far, substantially changed the overall spatial pattern of the sector: other regions are expanding, but London and the wider South East continue to account for the largest share of creative economic value. While Figure 5 is presented in current prices, DCMS real-terms estimates suggest weaker performance between 2022 and 2023, with creative industries GVA declining across all UK regions once inflation is taken into account (DCMS, 2025e).

[6] These figures record GVA by location of business registration rather than trading activity, which can overstate London's share where firms are headquartered in the capital but operate elsewhere.

Figure 6. **Creative GVA as a share of regional GVA**



Source: Author's calculations using DCMS (2025e), DCMS Sectors Economic Estimates: Regional Gross Value Added 2023 and ONS (2025), Regional gross value added (balanced) per head and income components. Visualisation created with flourish.studio.

Figure 6 shifts the lens from absolute creative GVA to creative industries as a share of each region's total GVA between 2010 and 2023. The stacked areas should be read as a visual comparison of regional shares over time, rather than as an additive total. The figure shows that London remains the clear outlier: creative industries accounted for around 10% of London's regional GVA in 2010, rising to a peak of around 12% in 2021. The South East remains the next highest region, at around 6%, while most other regions sit within a much narrower band.

Read alongside Figure 5, this suggests that London's lead is not only a matter of economic scale. Creative industries make up a larger share of London's economy than they do elsewhere, indicating a degree of structural concentration as well as absolute concentration. At the same time, the gap looks smaller than in the absolute GVA chart, showing why both measures are useful: Figure 5 shows where most creative economic value is generated, while Figure 6 shows where creative industries are most important relative to the size of the regional economy.

Figures 4 to 6 show a creative economy that is growing, but unevenly distributed. Creative employment has expanded across the UK, and most regions have also seen growth in creative GVA. However, the geography of creative economic value remains strongly concentrated in London and the wider South East. London accounts for around half of UK creative industries GVA, while the South East adds roughly a further sixth. Creative employment is more evenly distributed than GVA, but the broad geography of high-value creative activity remains closely tied to the London–South East corridor.

This concentration provides the empirical context for the policy landscape examined in the next section. It shapes where high-productivity creative jobs are located, where finance and investment are more likely to flow, and which places have the institutional density to sustain wider creative ecosystems. Section 3.3 therefore considers whether UK industrial strategy and creative-industries policy have sought to broaden this base, and what tools have been used to do so. Section 4 then turns to the firm level. Drawing on portfolio data from Creative UK's Creative Growth Finance fund, it examines how far specialist finance reaches beyond the dominant London–South East corridor into regions and sub-sectors with smaller absolute GVA, but important social and cultural roles. It also considers whether the performance of investee firms reflects or challenges the aggregate patterns shown in this section. The case study therefore provides a bridge between the macro-level geography of creative value added set out here and the micro-level realities of accessing capital and growing a creative business in different parts of the UK.

3.3 Policy landscape, place and finance

As Table 3 shows, UK creative-industries policy has changed substantially over the past three decades. In the late 1990s and early 2000s, the sector was increasingly framed as a vehicle for economic modernisation, urban regeneration and cultural renewal. This agenda was supported by the Creative Industries Mapping Documents and by place-based initiatives linked to regional development and cluster policy. During the 2010s, austerity reduced parts of the local and cultural funding base, even as creativity remained visible within national economic policy through the 2017 Industrial Strategy and the 2018 Creative Industries Sector Deal. The pandemic and Brexit then exposed longstanding vulnerabilities in the sector, particularly around freelance work, live performance, touring, access to finance and the resilience of small firms (Carey, Giles and O'Brien, 2023; Goddard, 2023; House of Lords Communications and Digital Committee, 2023; Swords and Prescott, 2023).

The Creative Industries Sector Plan marks a more explicitly industrial-strategy-oriented approach. It places the creative industries within the UK's Modern Industrial Strategy and presents the sector as one of eight priority growth sectors. Its priorities include innovation and R&D, access to growth finance, workforce skills, exports and place-based creative clusters. Specific measures include further investment in CoSTAR, a stronger role for the British Business Bank, work with the Intellectual Property Office on IP-backed lending, and support for creative places and clusters across the UK (DBT, 2025). These priorities reflect a growing recognition that the sector matters not only for cultural value, but also for productivity, investment and regional growth.

Table 3. Creative industries spatial policy in the UK, 1995-2025

Time period	Main policy focus	Key policy developments	Implications
Mid-1990s–2010	Urban regeneration and economic modernisation	Creative Industries Mapping Documents, Regional Development Agencies, Arts Lottery funding and cluster-based approaches	Major cities benefited most, while smaller places saw more uneven results
2010–2020	Austerity, then renewed industrial-strategy interest	Funding cuts were followed by the 2017 Industrial Strategy, 2018 Sector Deal, AHRC Creative Industries Clusters Programme, Great Place Scheme and Cultural Development Fund	Support became more competitive and uneven, with cluster funding focused mainly on growth and innovation
2020–2023	COVID-19 and Brexit crisis response	Culture Recovery Fund, economy-wide employment support and sector guidance on post-Brexit touring, trade and mobility	Emergency support helped institutions survive but exposed the vulnerability of freelancers, small firms and live events
2023–2025	Innovation, clusters and sector-led industrial strategy	Creative Industries Sector Vision, Creative Industries Sector Plan, CoSTAR, Creative Places Growth Fund, British Business Bank support and IP-backed lending work	Policy became more explicitly industrial-strategy oriented, but regional and financial inequalities remain

Source: Author's own synthesis based on DBT and DCMS (2025), DCMS (2023), House of Lords Communications and Digital Committee (2023), and Swords and Prescott (2023).

This shift has implications for organisations such as Creative UK. Many creative businesses depend on intangible assets, including intellectual property, brand, design capability and creative talent, which can be difficult for lenders and investors to value as collateral. Earlier research found that creative firms were more likely than comparable non-creative firms to be rejected for loans, and that some did not approach lenders because they expected to be turned down (Fraser, 2011). More recent evidence points to persistent finance constraints. A survey of 896 creative businesses found that creative organisations were more than four times more likely than businesses in the wider economy to identify access to the right type of finance as a barrier to growth; 51% believed funders viewed them as too risky to invest in; and 41% said there were no suitable financial products for their needs (Bakhshi, Siepel, Carmona and Tarr, 2025). Other research finds that creative firms identify opportunities to invest in innovation and new products, but do not receive finance for those opportunities at the same rate as firms in other sectors (Siepel, Rathi and Cowling, 2024). Together, these findings help explain why the Sector Plan gives attention to tailored finance mechanisms, including British Business Bank support, work on IP-backed lending and patient capital (DBT and DCMS, 2025).

The evidence base for creative-industries policy has also strengthened. Lyons and Connolly (2024) argue that existing economic statistics do not fully capture the sector's regional and inter-sectoral contribution, partly because current data struggles to identify supply-chain links between creative firms and other parts of the economy across UK nations and regions. Cluster research similarly shows that growth opportunities exist outside London and the South East, but that firms outside the main creative clusters can face weaker access to finance and scale-up support (Siepel, Rathi and

Cowling, 2024). International evidence points in a similar direction: UNESCO (2022) highlights the economic and social value of cultural and creative sectors, while also showing that public expenditure on culture has declined as a share of GDP in many countries.

Anchor institutions are another part of this policy picture. Mazzucato et al. (2020) argue that the BBC's value should be understood not only through audience reach or programme output, but also through its wider role in shaping markets, developing capabilities and supporting innovation. Their report highlights the BBC's contribution to technology development and industry standards, including the DVB-T2 standard, which has been adopted by 166 countries (Mazzucato et al., 2020).[7] Coyle and Alayande (2024) similarly point to the BBC's role in the first deployment of long-form video on demand and the implementation of high-definition television, treating its R&D, commissioning and skills activities as classic industrial-policy tools. They make the broader point that the UK has often supported key sectors through fragmented or accidental interventions rather than a deliberately coordinated strategy. Evidence on the BBC's relocation to Salford also points to local creative-industry spillovers. Nathan et al. (2024) estimate that each BBC job was associated with 0.33 additional creative-industries jobs in Salford on average between 2012 and 2017, rising to 0.55 by the end of the period. Read together, these arguments suggest that institutions such as the BBC can matter for creative-industries productivity, but that their roles in R&D, commissioning, skills and regional development need to be understood within a coherent policy framework.

Access to finance remains a central challenge. Growth-finance evidence suggests that equity and venture capital are highly concentrated by place and by sub-sector. Between 2013 and 2023, 63% of creative-industries investments went to businesses in London and the South East, while 85% of investments were in IT, software and computer services. Around 92% of investments were made in firms located within the 55 creative clusters identified by DCMS, and 95% were in either creative clusters or microclusters (Siepel, Rathi and Cowling, 2024). Clustering can support innovation and knowledge diffusion, but it can also reinforce inequality if firms outside established clusters have weaker routes into growth finance. The Creative Industries Sector Plan responds to this problem through measures including an expanded role for the British Business Bank, work with the Intellectual Property Office on IP-backed lending, and place-based support for creative clusters (DBT and DCMS, 2025). Creative UK's Creative Growth Finance fund is one example of the specialist investment vehicles intended to address gaps in mainstream finance, and the next chapter examines how such approaches operate in practice.

Taken together, these developments form the policy backdrop for the analysis that follows. National industrial strategy now places greater weight on innovation, clusters, finance and anchor institutions, while access to finance and opportunity remains uneven across regions and sub-sectors. The Creative Growth Finance dataset examined in the next chapter should be read within this policy environment. It offers a small window onto the kinds of firms supported by specialist creative finance and helps connect firm-level evidence to the wider objectives and challenges of the UK's evolving industrial strategy.

[7] DVB-T2 stands for Digital Video Broadcasting – Second Generation Terrestrial. It is a standard used for digital terrestrial television transmission, helping broadcasters deliver higher-quality and more efficient TV services.

4. Case study: Creative UK

Creative UK is a national organisation dedicated to supporting the growth of the UK's cultural and creative industries. Building on the work of Creative England (2011–2021), it combines loan, equity and grant finance with tailored business support, aiming to fill the "step-up" finance gap faced by micro and small creative firms and to back businesses that struggle to access mainstream lending. Evaluations of its 2012–2017 investment programme show that around £20 million was invested in 350 companies, with roughly 81% of this finance going to firms outside London and the South East and a strong emphasis on micro and small enterprises. These investments have been linked to high three-year survival rates, job creation and safeguarding, and the mobilisation of approximately £4 of external capital for every £1 of public funding (The Good Economy, 2018).

Recent strategy documents take this model further. Norbury and Tarr (2025) propose Creative Economy Capital as a framework for improving how finance reaches creative organisations at different stages of growth. Rather than presenting it as a single new funding body, they frame it as a way to coordinate existing and new sources of capital more effectively, using public investment to reduce risk for private funders and to support more appropriate finance across the creative economy.

The Creative Growth Finance (CGF) portfolio can be read as one practical example of this wider approach to specialist finance. The dataset analysed in this report captures only one part of Creative UK's investment activity, but it offers a firm-level view of how tailored finance reaches creative businesses across different regions and subsectors. This is important because official classifications, while essential for defining and measuring the creative industries, capture only part of the sector's structure and dynamics. As discussed in Chapter 2, SIC-based statistics can understate the diversity of creative businesses, particularly where creative activity is embedded in digital services, specialist suppliers or firms whose work cuts across standard industrial categories. Firm-level evidence is therefore useful for understanding how creative enterprises operate in practice and how their financial, organisational and spatial characteristics vary across subsectors.

The CGF case study is used in this context. It is not intended as a comprehensive impact evaluation of Creative UK. Instead, it offers an illustrative snapshot of how specialist finance reaches firms in different regions and subsectors, and how supported businesses vary in terms of size, growth, productivity and resilience.

4.1 Data and analytical approach

This analysis is based on company-level data provided by Creative UK for firms supported through the CGF portfolio. The dataset contains financial and descriptive information on creative businesses that received funding at different points in time and under varying terms. Although coverage is uneven, it provides a useful basis for exploring how investment has been distributed and how supported firms have performed across regions and subsectors.

To undertake the analysis, the records were structured as a panel dataset. Each observation represents a business at a specific point in time, and the compiled dataset spans the period from 2020 to 2025. This structure makes it possible to examine changes within firms over time, as well as broader patterns across the supported businesses.

The data include variables across three broad areas: geography, financial performance and organisational characteristics. For each business, the dataset records city, region, subsector and investment type. Financial indicators include profit, revenue, total assets, liabilities, earnings before interest, taxes, depreciation and amortisation (EBITDA), and net assets. Information on loan size and year of funding allows the analysis to examine how capital flows vary by geography and over time. Productivity is estimated using revenue per employee, while employee count, overhead cover and cash runway are used as indicators of business scale and resilience.

Some firms appear more than once, either because information was supplied in separate files or because updated records were provided at different points in time. To improve comparability, monthly figures were aggregated into annual observations where appropriate. Firms also reported on different financial-year cycles, so entries were standardised to a January–December year. Where only average figures were available, totals were estimated by multiplying the average by the number of companies in the relevant group.

Creative UK selects companies for Creative Growth Finance through a structured qualification process. Businesses are expected to be UK-registered, operating within the creative industries, trading for at least 12 months and generating minimum annual revenue of £300,000. The CGF fund does not typically invest in content vehicles, focusing instead on 'top-co' businesses with an identifiable revenue pipeline, although Creative UK's wider investment activity can include content investment. Once initial eligibility is established, investment decisions are made based on the company's ability to service a loan and the strength of its application across several key dimensions:

- Director and company-level KYC (Know Your Customer) checks, including compliance with anti-money laundering and anti-terrorist financing regulations.
- Strength and experience of the leadership team.
- Market potential and competitive positioning.
- Quality of the company's core product or service.

These criteria are often summarised internally as the "5 P's": Place, Product, People, Plan and Price.

4.2 Sample, methodological choices and limitations

The case study draws on financial and workforce information for 40 firms that received investment through CGF. The dataset covers firm-level observations across the period 2020–2025. The sample is diverse in size, subsector and region, and the underlying information reflects the inconsistencies often found in self-reported data from early-stage and growth-oriented businesses. Some firms supplied full accounts, while others provided only partial indicators. A small number of high-growth firms have a strong effect on raw values, particularly for revenue and employment. For this reason, the analysis should be read as indicative rather than representative of the wider CGF portfolio or the UK creative industries as a whole.

Several methodological choices were made to reduce the influence of outliers and protect confidentiality:

- Growth banding: Revenue and employment changes were grouped into growth bands: (Negative, 0–25%, 25–50%, 50–100% and above 100%). These bands refer to percentage differences observed across the dataset period, rather than annualised growth rates. This reduces the influence of outliers, allows comparisons across firms of different sizes and supports the presentation of results as percentages rather than absolute figures. In a sample of this size, percentage changes provide more meaningful insight and help avoid overstating the role of firms in subsectors or regions where only one or two observations exist.
- Averaging sector indicators: Sector-level metrics such as revenue per employee were presented as simple averages rather than raw values. This protects confidentiality, smooths the effect of extreme performers and provides a clearer comparison across subsectors with small numbers of firms.
- Anonymisation: No company names are reported. All results are aggregated and anonymised in line with best practice in the creative industries literature, where sample sizes are typically small.

While the dataset provides valuable insight, it has some limitations that should be considered when interpreting the results. The sample is small and non-random, meaning the findings cannot be generalised to the wider CGF portfolio or to the UK creative industries more broadly. The financial reporting years are not perfectly aligned despite standardisation. Some variables are missing or incomplete and some rely on self-reported information of varying accuracy, and financial reporting years are not perfectly aligned despite standardisation. The presence of a few very high-growth firms affects averages and distributions, although the use of bands helps moderate this effect. The dataset does not support analysis of counterfactuals, displacement effects or longer-term spillovers. Regional patterns must also be read cautiously, as some regions contain only one or two firms. For these reasons, the dashboard and analysis should be understood as an illustrative snapshot of how a group of supported firms has evolved, rather than a formal impact assessment.

Despite these constraints, the dataset gives us a rare opportunity to examine the relationship between investment and individual business outcomes in the creative sector. It offers insight into where funding has gone, which types of firms have received support, and how these businesses have evolved over time.

4.3 Discussion

The dashboard on page 24 provides a small but valuable snapshot of firm-level patterns within the CGF sample. The findings should not be read as a causal impact evaluation, nor as representative of the wider creative economy. The dashboard does, however, provide firm-level evidence of how CGF-supported businesses are growing, where investment is reaching, and how outcomes vary across subsectors and regions. The patterns observed in this CGF sample are consistent with wider research showing that creative industries growth is uneven across places and subsectors, and that creative firms often face barriers in accessing suitable finance, particularly where business value is tied to intangible assets rather than conventional collateral (Fraser, 2011; Nesta, 2018; Di Novo et al., 2022; Siepel, Rathi and Cowling, 2024).

The revenue results suggest that many firms in the sample experienced positive turnover growth. The largest group recorded revenue growth of 0–25%, while another sizeable group more than doubled turnover. This points to a mixed but encouraging growth profile, with many firms growing steadily and a smaller number expanding more rapidly. Such skewed growth dynamics are consistent with wider evidence that growth opportunities and access to finance are unevenly distributed across creative firms, subsectors and places (Siepel, Rathi and Cowling, 2024). CGF is designed to address some of these constraints by providing specialist finance that is more closely aligned with the business models and risk profiles of creative firms. While the dataset cannot identify causal effects, the prevalence of positive revenue growth is consistent with the role that specialist finance can play in helping creative firms pursue expansion.

Employment growth shows a similar pattern. In this sample, a significant share of firms increased their workforce by up to 25% and a further group more than doubled employment over the period. Only a minority recorded declines in headcount. Given the small size of many investee companies, even modest increases translate into meaningful job creation. The presence of very high employment growth among a handful of firms suggests that CGF is reaching some businesses with the capacity to scale employment quickly. At the same time, the mixed pattern of expansion and contraction reflects the uneven conditions facing creative businesses, where employment growth potential sits alongside volatility, project-based work and insecure working conditions (OECD, 2022; Carey, Giles and O'Brien, 2023). The mixed pattern observed here, including both expansion and contraction, is typical for the sector and reflects the environment that CGF is designed to help firms navigate.

The sector-level results further suggest that CGF is reaching parts of the creative economy associated with knowledge-intensive and digitally enabled activity. IT Tech, Digital Media and Production record the highest revenue per employee among the subsectors shown, indicating that some supported firms are generating substantial value relative to

Chart 1. Change in revenue

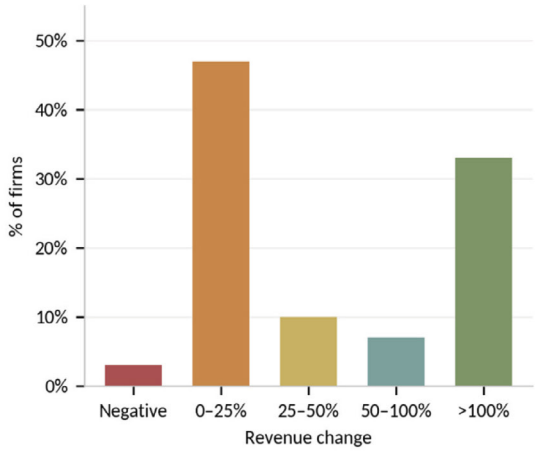


Chart 2. Change in employment

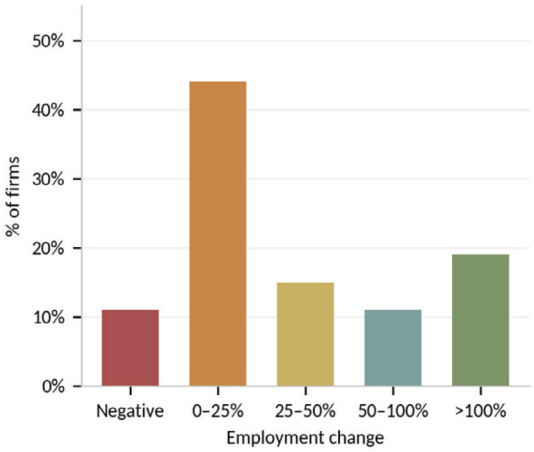


Chart 3. Revenue per employee

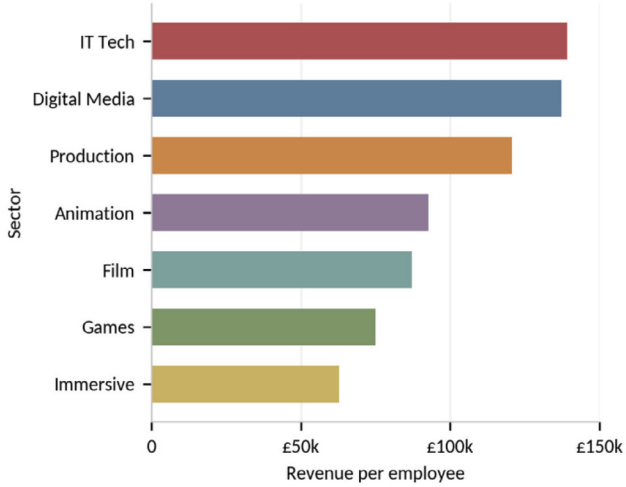


Chart 4. Loan amount distribution

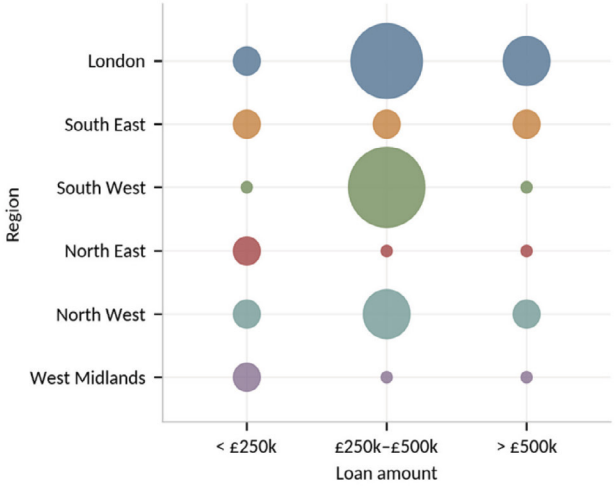
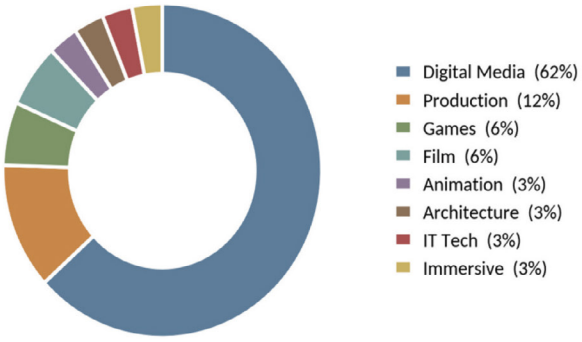


Chart 5. Sector breakdown



Source: Author's elaboration on Creative UK's CGF portfolio.

workforce size. This should not be treated as a general productivity ranking across the creative industries, because the sample is small and subsector coverage is uneven. However, it does suggest that CGF is present in segments of the creative economy where intellectual property, technical capability and specialist skills can translate into high-value business activity.

The regional distribution of loan amounts also points to a positive role for CGF. London has a strong presence across loan-size bands, but firms in the South West, North West, North East and West Midlands also appear in the sample. The South West is particularly visible in the £250,000–£500,000 band. This suggests that CGF is not confined to the dominant London–South East corridor and is reaching firms in regions where creative activity may be meaningful but less well served by mainstream growth finance. This matters because wider research shows that creative activity exists across the UK, while access to finance remains uneven and often concentrated in established clusters (Mateos-Garcia, Klinger and Stathoulopoulos, 2018; Siepel, Rathi and Cowling, 2024).

The final chart shows that the CGF case-study sample is heavily weighted towards Digital Media, with smaller groups working in Production, Games and Film, and only a handful in IT Tech, Immersive, Architecture and Animation. This profile is not representative of the creative economy as a whole, but it does indicate that CGF is supporting firms in digital, screen and interactive areas that are increasingly central to the sector's growth and innovation profile.

Read together, these findings provide an illustrative picture of CGF's contribution to firm-level growth. Despite the limitations of the dataset, the evidence suggests that the programme is reaching companies with clear growth potential and enabling them to expand revenue, create jobs and generate value within high-productivity segments of the creative economy. More broadly, the case study contributes to the evidence that sector-specific finance remains an important mechanism for supporting creative SMEs, particularly where business models depend on intangible assets and project-based production that traditional lending frameworks do not easily accommodate.

The firm-level patterns shown in the dashboard also illustrate the diversity of business models, financial trajectories and regional specialisms within the creative industries. These variations help explain why creative enterprises experience technological change in different ways. Subsector capabilities, workforce structures, access to finance and local ecosystem characteristics all shape how firms adopt new tools, respond to emerging technologies and navigate the opportunities and pressures of digital transformation. The next chapter therefore examines current evidence on innovation, AI and automation in the creative industries, situating the dashboard findings within broader technological and organisational trends.

5. Transformation in the creative economy: AI, automation and access

The dashboard in the previous chapter showed that growth, productivity and regional reach varied considerably across firms in the Creative UK sample. Explaining these differences requires moving beyond financial indicators to consider the technological, organisational and policy environment in which creative firms operate. Recent debates around AI, virtual production and digital tools have brought these questions into sharper focus.

Recent advances in generative and multimodal AI are widening the range of creative tasks that can be supported across production workflows. Large language models and diffusion-based generators are now being applied to drafting and revision, archive search and classification, post-production enhancement and delivery workflows. Anantrasirichai, Zhang and Bull (2026) highlight rapid progress in multimodal generation, real-time 3D reconstruction and unified models that combine several creative functions within one framework, while still emphasising the continuing role of human oversight.

A useful way to clarify what AI is actually doing is to distinguish between its main roles in creative production. Anantrasirichai and Bull (2022) group creative AI applications into five broad areas: generating content, analysing information, enhancing and post-processing content, extracting and improving information, and compressing data. This framing captures tools already visible in everyday practice, from assisting animation and audio processing to indexing large datasets, speeding up rendering and refining footage. The key point is less replacement than reconfiguration: these systems can increase speed and capacity, but typically still require human direction, judgement and quality control, especially where meaning, style and context are central. Erickson's (2024) qualitative study of six firms that commercialised AI products similarly finds that AI did not simply reduce labour requirements. In several cases, AI-enabled products required more work than traditional media products because they combined established creative production skills with new computational expertise.

Virtual production is reshaping film and television in parallel. By combining real-time game engines, computer-generated environments and in-camera visual effects, it allows creative teams to visualise and adjust sets, locations and production choices earlier in the process, with implications for coordination, skills and production planning (Swords and Willment, 2024). These changes, however, do not land evenly. Creative activity and supporting capabilities remain highly concentrated: nearly 68% of UK creative-industries GVA is generated in London and the South East, while Siepel et al. (2023) describe London and the Greater South East as a creative "supercluster". This concentration matters because advanced production technologies depend not only on individual firms, but also on access to skilled workers, facilities, suppliers and partner networks.

These dynamics help interpret the heterogeneity visible in the Creative UK dashboard. Differences in revenue growth or productivity across firms are likely to reflect, in part, uneven digital capability, access to specialist skills and the strength of local ecosystems that enable experimentation and adoption. Firms in sub-sectors that are more capital-intensive or more deeply embedded in advanced production pipelines may be better positioned to capture efficiency gains from AI-enabled workflows, while firms with thinner technical capacity may face higher adjustment costs. Variation in regional reach also sits alongside uneven geography: firms based in or connected to stronger clusters may find it easier to access partners, facilities and finance, while otherwise comparable firms elsewhere may rely on weaker supplier networks and more constrained labour markets.

AI also raises governance questions that the existing creative-industries policy framework was not built to handle. The use of copyrighted works to train commercial models, the licensing of generated outputs, and the recognition and remuneration of human contributors have become increasingly contested issues in creative sectors. Glenster et al. (2025) argue that the UK creative industries could benefit from generative AI, but that these gains depend on managing copyright, transparency, workforce capability and the distribution of benefits. Lee (2022) adds a labour-focused critique, arguing that creative-industries discourse has often made the work behind creativity less visible by framing creativity mainly as human capital and a source of intellectual property. In the context of generative AI, these concerns become sharper, as questions about authorship, remuneration and the visibility of human labour become harder to resolve (Lee, 2024).

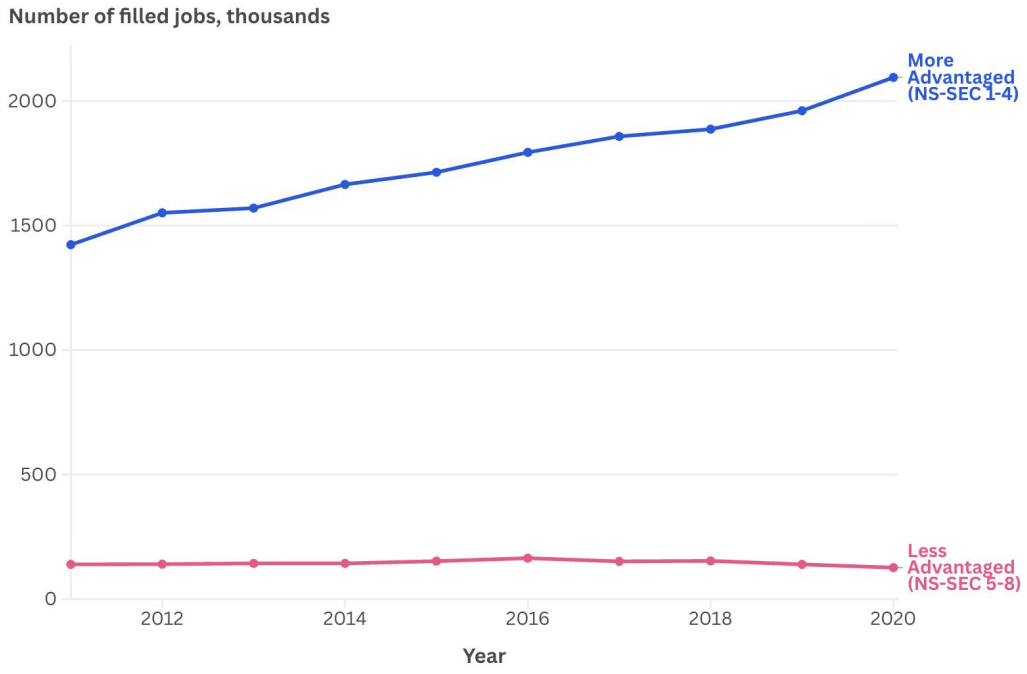
Those enabling conditions also extend beyond the firm. Around 28% of creative-industries jobs were self-employed in 2023–24, compared with 14% across all UK jobs, underlining the importance of self-employed work in the sector (House of Commons Library, 2025). The Cultural Freelancers Study, based on a survey of more than 5,000 cultural freelancers in England, reports wide variation in earnings, short engagements, portfolio working across multiple contracts and reliance on professional networks to secure work (Arts Council England, 2024). Taken together, this implies that experimentation with virtual production, real-time pipelines or AI-enabled workflows often depends on the capacity of freelancers and specialist suppliers as much as on the lead firm's intent. Where local networks are thin, or where skills and equipment are scarce, adoption may be slower or more partial, especially in a sector where freelance and project-based work are common (Carey, Giles and O'Brien, 2023).

These technological changes also raise questions about inclusion. The benefits of AI, virtual production and digital tools depend not only on firm-level adoption, but also on who can enter creative work, access training and networks, and capture value from new forms of production. Box 1 summarises evidence on socio-economic background and participation in the creative workforce.

Box 1. Participation, inequality and creative labour

Patterns of participation in creative work show clear differences by socio-economic background. Figure 6 shows that filled jobs in creative sectors held by people from more advantaged backgrounds (NS-SEC 1–4) increased from around 1.42 million in 2011 to around 2.10 million in 2020. By contrast, filled jobs held by people from less advantaged backgrounds (NS-SEC 5–8) remained much lower, fluctuating between around 139,000 and 164,000 before falling to around 126,000 in 2020. This suggests that employment growth in creative sectors has been concentrated among people from more advantaged socio-economic backgrounds, even as the creative economy has expanded overall.

Figure 7. Number of filled jobs in creative sectors by socio-economic groups



Source: Author's elaboration from DCMS Sector National Economic Estimates 2011–2020 (DCMS, 2021). Visualisation created with flourish.studio.

Access to creative and innovative work is shaped by the way creative labour markets operate. Research on creative labour highlights the role of informal recruitment, unpaid or low-paid entry routes, project-based employment and reliance on professional networks, all of which can make it harder for people without financial stability or existing industry connections to enter and progress in the sector (Hesmondhalgh and Baker, 2011; Eikhof and Warhurst, 2013; Brook, O'Brien and Taylor, 2020). Research on class and creative work finds persistent socio-economic imbalances, with people from privileged backgrounds more likely to enter creative occupations and progress into roles with greater autonomy, supervisory responsibility and managerial status (Carey et al., 2020). Studies of specific creative occupations, such as acting, similarly show that people from working-class backgrounds remain under-represented and face barriers to progression (Friedman, O'Brien and Laurison, 2017).

Innovation policy debates increasingly stress distribution as well as scale. Rather than focusing only on how much new activity is generated, work on inclusive innovation emphasises who is able to participate and who gains in practice (Coyle and Selvi, 2024). When opportunities are concentrated among groups with existing advantages, the potential pool of ideas, perspectives and creative skills is narrowed.

Intellectual property is central to how value is captured from creative and technical work, and the way IP rights are structured can reinforce wider inequalities in the sector. The Creative Industries Sector Plan places IP creation, protection and commercialisation at the heart of the sector's growth agenda, particularly in relation to innovation, AI and international competitiveness (DBT and DCMS, 2025). How that value flows in practice, however, is uneven. The parliamentary inquiry into the economics of music streaming documented widespread concern from performers and songwriters about poor returns under existing royalty arrangements, with the Committee calling for a 'complete reset' of how streaming income is shared (House of Commons Digital, Culture, Media and Sport Committee, 2021).

These dynamics have implications for both fairness and economic performance. Broadening participation would expand the range of skills, perspectives and creative capabilities available to organisations, while also helping to address skills shortages in areas such as digital production, design and technical services. It would also support local growth in regions where creative clusters are smaller but where young people show strong interest in creative work. Ensuring that more people can access training, networks and stable early-career pathways is therefore essential for an innovation system that reflects and benefits a wider share of the population.

Finally, policy shapes the direction and distribution of these changes. The Creative Industries Sector Plan places the sector within the wider Modern Industrial Strategy and sets out a ten-year framework spanning innovation and R&D, finance, workforce capability, exports and place (DBT and DCMS, 2025). Implementation will need to address the uneven capabilities across subsectors and regions documented above, alongside governance questions around intellectual property, training data and creator remuneration as AI becomes embedded in creative workflows. These issues provide the basis for the report's concluding policy implications, which consider how finance, skills, innovation and place-based support can be better aligned to strengthen the creative economy while widening participation in its future growth.

6. Conclusion and policy implications

This report has examined the creative industries through several connected lenses: how the sector is defined and measured, how output and employment are distributed across subsectors and regions, how productivity varies within the sector, how technological change is reshaping creative work, and what firm-level evidence from Creative UK's Creative Growth Finance portfolio can tell us about specialist finance. Taken together, the evidence points to a clear conclusion. The creative industries are already a major part of the UK economy, but the ways they are classified, measured, financed and supported have not fully kept pace with the sector's scale, diversity and economic potential.

How the creative industries are defined and measured shapes how they are understood in policy. SIC-based classifications and creative-intensity approaches provide an important foundation for official statistics, but they do not capture all forms of creative activity. Many creative workers are employed outside the official creative-industries codes, while some specialist suppliers, digital activities and cross-sector forms of creative work are difficult to identify through standard industrial categories. This fragmentation means that the contribution of the creative economy can be understated, and policy may overlook where creative skills are used elsewhere in the economy. Policies that rely only on headline categories risk reaching only part of the system and underestimating the sector's economic potential.

The national evidence points to a sector that has grown substantially, but unevenly. Economic value is concentrated in a relatively small number of high-value subsectors, particularly IT, software and computer services, advertising and marketing, and film and TV. The geography of the sector is also uneven. Creative GVA remains strongly concentrated in London and the South East, while creative employment is more widely distributed across the UK. This suggests that creative work takes place in many regions, but the highest-value activity remains more closely tied to places with stronger access to finance, infrastructure, specialist labour and institutional networks.

The Creative UK case study adds a firm-level perspective to the national picture. Although the CGF dataset is small and should not be read as a formal impact evaluation, it provides useful evidence on the growth trajectories, regional reach and subsector composition of CGF-supported firms. Many firms in the sample recorded positive revenue and employment growth, particularly in digital and screen-related parts of the creative economy. The portfolio also includes firms in regions that are less prominent in the national aggregates. The case study therefore reinforces a wider argument made throughout the report: that many creative businesses may need financial instruments better suited to intangible assets, project-based production and uneven patterns of growth than those usually available through mainstream finance.

The discussion of innovation, AI and participation shows how these patterns also play out in the labour market. AI and digital production tools may improve productivity, speed and creative capacity, but their benefits are unlikely to be evenly distributed without appropriate governance and support. Larger and better-resourced firms may be better placed to experiment, invest in training and manage legal or compliance risks, while smaller firms and freelancers often have fewer resources to absorb change. Longstanding barriers also remain, including informal recruitment, unpaid or low-paid entry routes and reliance on personal networks. Whether technological change strengthens creative work or widens existing inequalities will depend on how policy connects innovation with skills, intellectual property, workforce support and access.

Finally, the wider policy framework shapes how all of this evolves. UK governments have used many familiar tools of industrial policy, including tax reliefs, public service broadcasting regulation, cultural funding, skills initiatives and cluster programmes. These have influenced the growth and productivity of the creative industries, but often in a fragmented way, with frequent shifts of emphasis and uncertainty around key institutions. The Creative Industries Sector Plan (2025) marks an important shift by placing the sector within the wider Modern Industrial Strategy and setting out a ten-year framework around innovation, finance, skills, exports and place. The evidence in this report supports that shift but also suggests that implementation will need to be more coordinated, better informed by data and more attentive to regional and labour-market inequalities.

The creative industries are one of the UK's major economic and cultural strengths. They contribute to output, employment, innovation and productivity, while also shaping cultural life, public information and everyday experience. A more strategic approach to creative-industries policy would recognise this wider role. With better measurement, more appropriate finance, stronger institutional coordination and a clearer focus on who participates and where growth takes place, the UK would be better placed to sustain creative growth, support good work and spread the benefits of creative activity across regions and communities.

Policy implications

The analysis points to five areas where policy development could support more balanced and sustainable growth across the creative industries.

1. Prioritise place-based investment and the development of microclusters

Creative activity exists across the UK, but access to finance, specialist infrastructure and business support remains uneven. High-value creative activity remains concentrated in London and the South East, while many smaller clusters and emerging microclusters operate with weaker institutional and financial support. Policy should therefore continue to support nationally significant creative hubs, while also investing more deliberately in places with emerging creative capabilities. This would mean strengthening the conditions that allow creative firms to grow outside the dominant growth corridors, including access to appropriate finance, workspace, specialist infrastructure, skills, networks and business support. A more place-sensitive approach would not treat all regions in the same way. Larger clusters may require investment that deepens existing strengths, while places with less developed creative ecosystems may benefit from targeted interventions that build local capacity and connect firms to wider markets, institutions and supply chains. Aligning creative finance, skills programmes and innovation support more closely with local priorities would help reduce persistent regional disparities and support more distributed creative growth.

2. Strengthen data infrastructure for policy and investment decisions

The creative industries are not a data-poor sector, but the available evidence is often fragmented across different levels of analysis. National, regional, sectoral and occupational data provide an important picture of the sector's scale, geography and workforce composition, while firm-level data can help explain business growth, access to finance and productivity. However, these sources are not always well connected, making it harder to assess how creative firms grow, where support is reaching and what effects different policy and investment tools are having. Policy should therefore treat data and measurement as a core part of creative-industries strategy, rather than as a technical background issue. This would require stronger links between industry- and occupation-based measures, regional statistics, supply-chain evidence and anonymised firm-level information on finance, growth and productivity. There is also scope to explore alternative classification methods that group firms according to what they actually do, rather than relying only on fixed industrial codes. Improving this evidence infrastructure would make it easier to trace where value is generated, how creative activity connects to other sectors, and whether specialist finance, tax reliefs, cluster support and other policy tools are achieving their intended effects. It would also help policymakers move beyond headline sectoral categories and develop a more accurate picture of how creative firms grow, where support is reaching, and where gaps remain.

3. Connect AI adoption with creative workforce support

AI and digital tools are becoming embedded in creative production, changing how creative work is produced, valued and governed. These changes raise important questions about authorship, labour value, intellectual property and the distribution of benefits. Support for AI adoption could therefore be linked more closely to training, workforce development and fair commissioning practices. This might include clearer guidance on the use of AI-generated content in contracts and commissioning, support for workers whose roles may change, and incentives for responsible approaches to AI through public funding, procurement and R&D activity. This is particularly relevant for freelancers and small firms, which play an important role in many parts of the creative industries but may lack the resources to invest in training, legal advice or new technology. Approaching AI adoption in this way would help ensure that technological change strengthens human creativity and supports good work in the creative industries, rather than widening existing inequalities.

4. Build long-term capacity by connecting creative finance, skills and innovation

Support for the creative industries has often involved a mix of short-term programmes and separate interventions. The evidence in this report points to the need for stronger coordination across creative finance, skills, innovation and place-based support, so that these interventions work together rather than reinforcing fragmented policy design. This includes linking financial support more closely with skills development, digital adoption and fair commissioning practices. It also means recognising that creative activity contributes to wider value creation beyond the creative industries themselves, including through digital services, design, tourism, education, branding and innovation. Connecting these agendas more deliberately would help creative firms grow, strengthen local ecosystems and support a fairer distribution of value across firms, workers and places.

5. Improve entry routes and support for the creative workforce

In some areas of the creative industries, access to work can be shaped by unpaid or low-paid entry routes, project-based employment and the importance of existing professional networks. These conditions can make it harder for people without financial security or existing industry connections to enter and progress in the sector and may contribute to the socio-economic inequalities shown in the workforce data. Improving entry routes should therefore be seen as part of the sector's growth agenda. This could include clearer and more accessible entry routes, paid early-career opportunities, stronger links between education and employers, and better support for workers in project-based roles. A more accessible creative workforce would widen the range of skills, perspectives and ideas available to the sector, while also supporting more sustainable creative growth.

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UNIVERSITY OF CAMBRIDGE | Bennett School of Public Policy

Bennett School for Public Policy
Alison Richard Building
7 West Road, Cambridge CB3 9DT

Email: enquiries@bennettschool.cam.ac.uk
bennettschool.cam.ac.uk