Skills Investment Plan

For Scotland's Creative Industries sector

Skills Development Scotland

The Scottish Government
Riaghaltas na h-Alba

Foreword

Bobby Hain
Director of Channels at STV and Chair of the Creative Skillset Scotland National Advisory Board

The influence and impact that the Creative Industries sector has on Scotland – both economically and culturally – is deep and varied.

The headline figures alone are impressive. Some 68,500 people across Scotland are employed in the Creative Industries, with more than 13,800 enterprises generating revenue in excess of £3billion per annum.

However, that is only part of the story. Beyond this significant economic impact, there can be no sector of our economy that contributes so richly and so fundamentally to Scotland's cultural identity.

Many would argue it is here that the real value of Scotland's Creative Industries lies. It's an industry which helps define who we are as a nation and how others across the world see us, while giving a voice to its many constituent parts.

This is borne out by how fiercely issues surrounding the Creative Industries are debated, from our arts festivals and venues to Scotland's media landscape.

Such debates are always multi-faceted, but one key issue which is never far from the centre of any discussion is the development and retention of skills in Scotland's Creative Industries.

The sheer breadth of skills encompassed by the Creative Industries in this respect needs to be appreciated. It covers everything from Architecture and Computer Games to TV & Radio, and Fashion & Textiles, with each of the 16 industries needing a wide variety of skills in order to prosper.

Not only does this make Scotland's Creative Industries unique among the nation's economic sectors, but it underscores the fact that its importance goes far beyond financial considerations – it helps define who we are as a country.

It follows that building a framework that will allow the necessary creative skills to flourish is a complicated process that will require the backing of a wide variety of industry players if it is to succeed.

This is what the Skills Investment Plan (SIP) sets out to do. It has been developed in consultation with a broad range of voices from across the Creative Industries, ranging from employers to Creative & Cultural Skills and Creative Skillset, trade unions, colleges, universities and other public sector agencies.

As a result of these consultations, it aims to offer a clear picture of the sector as it looks today, the skills challenges it faces, the skills provision that currently exists and where priorities for future action should lie.

Ultimately, this is a plan which must be owned by Scotland's Creative Industries Sector itself. Skills Development Scotland (SDS) has acted as a facilitator as the SIP took shape, but turning the aims at the heart of the plan into reality will require a concerted effort from all those industries concerned.

This will involve engaging with the themes of the action plan from developing industry readiness and progression and addressing the creative digital agenda to developing leadership, business skills and new approaches to training delivery.

At all times, this is a plan which recognises the make-up of the sector, in particular the dominance of sole traders, micro businesses and small firms, and importantly, it offers the necessary degree of flexibility, taking into account the ever-changing landscape in which Scotland's Creative Industries operate.

It offers a vision of Scotland where a wide variety of creative skills lie at the heart not only of the nation's economy, but of the nation's cultural identity, with a workforce well-equipped to apply those skills in the national and international marketplace.

1 Purpose of the Skills Investment Plan

The Skills Investment Plan (SIP) for Scotland's Creative Industries sector is an industry-led partnership document facilitated by Skills Development Scotland (SDS) on behalf of Scottish Government.

The Skills Investment Plan is a strategic document, identifying key issues, drivers and themes impacting on the development and delivery of skills needed to sustain growth across the Creative Industries sector.

The development of the Skills Investment Plan involved gathering and analysing a range of primary and secondary data. These findings were tested and validated with a significant grouping of industry employers, agencies, sector skills councils, associations, tertiary education and public bodies with a deep interest in the skills and development issues impacting on the sector.

The SIP is a strategic, three year plan and responsibility for implementation and monitoring of the work will sit with the Creative Industries Skills Forum, supported by SDS.

The purpose of the SIP is to:

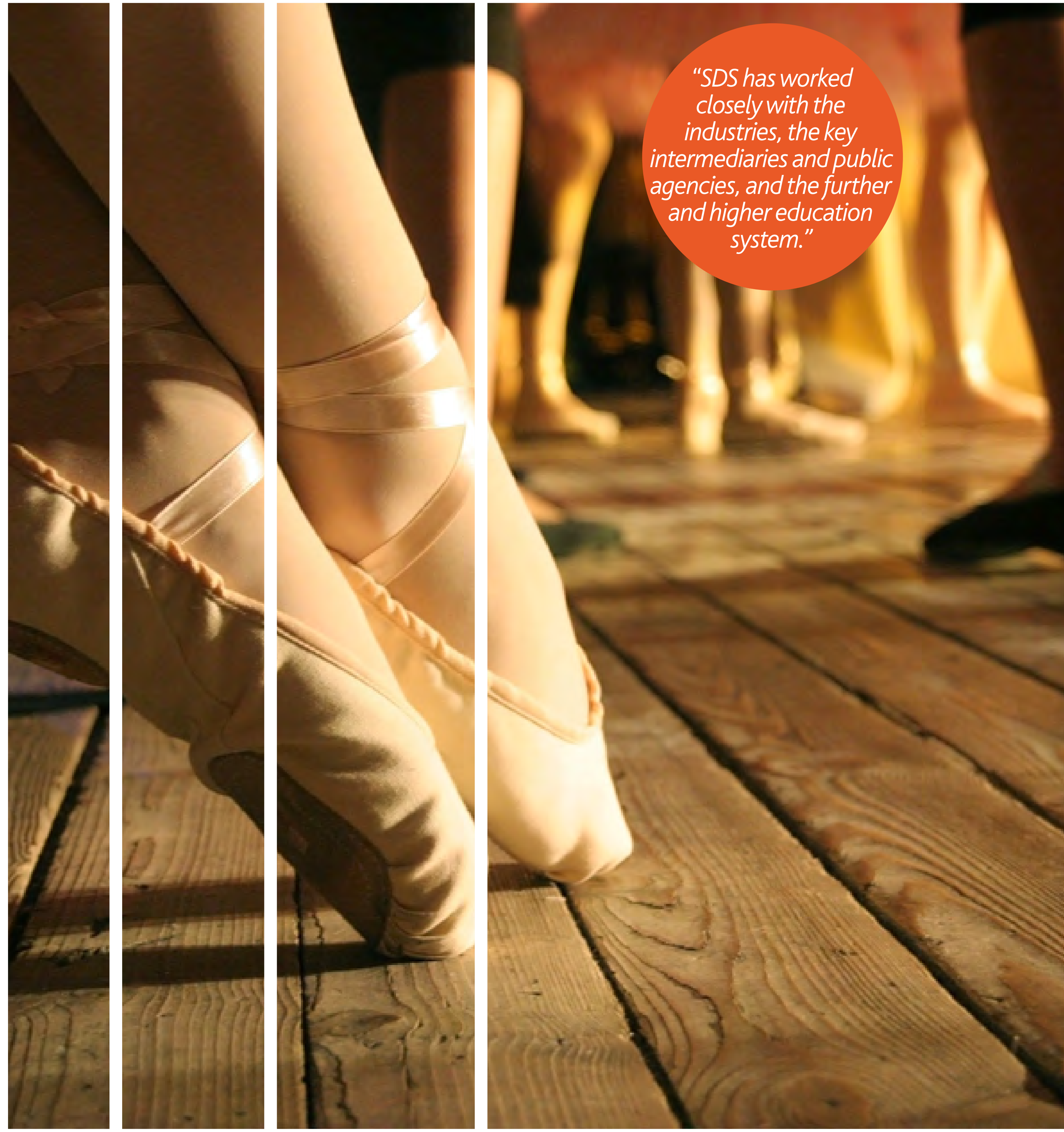
- validate and bring clarity to the scale and nature of the skills issues facing Scotland's Creative Industries
- create direction and bring focus to the nature of the response required by the employers and the public & private sector skills system to address the priority skills issues
- provide a framework for private and public sector investment to develop skills provision to meet industry needs
- stimulate and support industry ownership of its future success through commitment to and investment in skills.

The key stages in the SIP development process are set out in Figure 1.1 below.

This Skills Investment Plan presents a strategy and actions that seek to develop new and existing diverse talent that can utilise and deploy their skills in Scotland's Creative Industries. The plan aims to foster new engagement between the industries, and education providers and funders to jointly rise to this challenge.

Figure 1.1: SIP development process

1. Define sector; collate and review evidence
2. Test and validate research findings with stakeholders and employers
3. Secure buy-in for draft SIP
4. Develop SIP and Action Plan
5. Publish SIP and Action Plan



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2 Characteristics of the Creative Industries sector

Scotland's Creative Industries contribute significantly to the economy. The sector generated GVA of £3.06 billion in 2012 and employs some 68,500 people.

Following a long trend of strong and consistent growth in Scotland, many parts of the creative industries were hit hard and early by the recession. However, whilst economic growth is the focus of this plan, the strength and importance of the sector lies not only in its direct economic contribution, but in the contribution Scotland's creative capacities and the cultural legacy made across sectors, and to the well-being of individuals and our communities.

Recent economic analysis and forecasts[1] indicate the sector is returning to pre-recession levels, with sub-sectors continuing to strengthen and re-establish, indicating the resilience and ambition of the sector. In this section we review the key economic and labour market information relating to the sector in Scotland. This is a synthesis of data drawn from national sources and research undertaken by ourselves and partners.

Sector definition

The creative industry's sector footprint is complex, with a diversity of industry bodies and strategic groups engaged in supporting different elements of the sector and sub-sectors. Similarly, at the time of writing, the development of Creative Scotland's Creative Industries Strategy is underway and a growth strategy for the sector is anticipated. This poses a challenge for the industry in developing a Skills Investment Plan that speaks to the range of perspectives and needs across the creative industries.

We have followed the sector definition set out in the Creative Industries Sector Report (Scottish Government, 2009), which was subsequently amplified by the Economic Contribution Study: An Approach to the Economic Assessment of the Arts & Creative Industries in Scotland (Creative Scotland & Scottish Enterprise, June 2012).

Scottish Government describes the creative industries as "those that have their origin in individual creativity, skill and talent. They also include industries that have the potential to create wealth and job creation through the development, production or exploitation of intellectual property[2]".

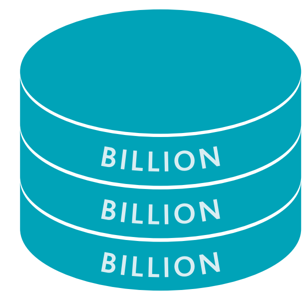
The sector is made up of 16 industries:

Advertising	Libraries and Archives
Cultural Education	Music
Architecture	Performing Arts
Computer Games	Photography
Crafts and Antiques	Software and Electronic Publishing
Design	TV and Radio
Fashion and Textiles	Visual Arts
Film and Video	Writing and Publishing

[1] Trends identified through the Scottish Government Growth Sector Database
[2] Creative Industries Key Sector Report, Scottish Government 2009.

The Creative Sector in numbers

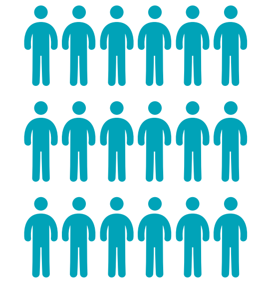
Just how big?[A]



Generated
£3.06
billion

Employs
68,500
people

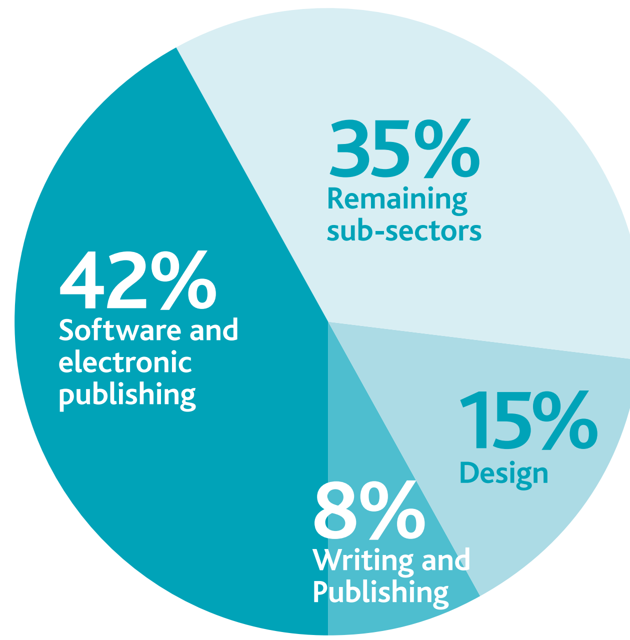
Sector business sizes?[C]



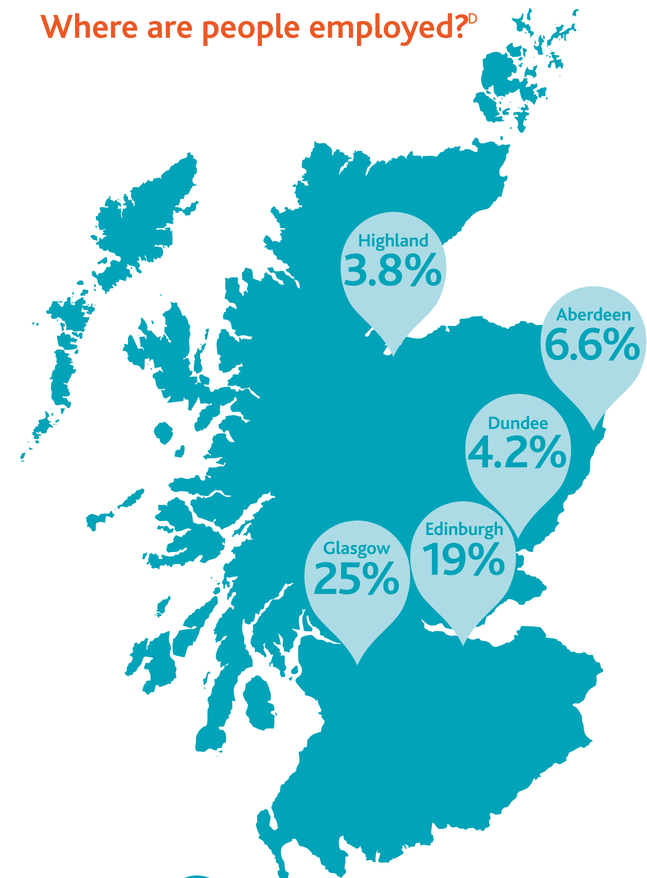
98%
employ 0-49 employees

<1%
employ >250 employees

Size of sub-sectors?[B]

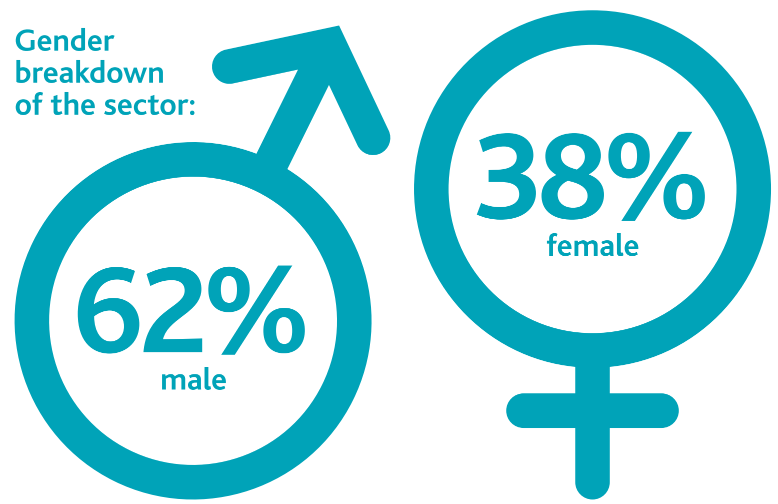


Where are people employed?[D]



Sector based employees

Gender breakdown of the sector:



5%
of those in the sector report having a disability compared to 11% across all sectors

[A] In 2012. Figure in GVA.
[B] In 2014 for registered enterprises. Figures have been rounded up.
[C] In 2014.
[D] By local authority area

2 Characteristics of the sector in Scotland continued

Given the breadth of the industry and particular technical and craft disciplines within each, it is beyond the scope of the Skills Investment Plan to present in depth analysis of the skills position for each sub-sector. This document and action plan aims to present an overarching and strategic perspective on the work that can be done across the industry and skills system to address systemic issues that will benefit the industry broadly.

Business base

In March 2014 there were over 13,800 registered enterprises operating in the Creative Industries growth sector, representing around 4% of all registered businesses operating in Scotland. This is an increase of around 7% on the 2013 figure, and a 29% increase since 2009. Almost all enterprises in the sector are Scottish owned (97.5%), with less than 1% of businesses being foreign-owned. Businesses in the creative industries take a variety of forms: ranging from social enterprise, charities, and other not-for-profit structures, to profit making companies of varying structures. This reflects some of the complexity of the different contributions the creative industries make to Scotland's economic, cultural and community life.

Business size

The sector is dominated by sole traders, micro and small businesses, with around 13,500 businesses employing 0 to 49 employees and accounting for nearly 98% of the total number of businesses in 2014. This is an increase of 35% in the number of small and micro businesses since 2009.

Large enterprises, employing more than 250 employees, accounted for less than 1% of registered enterprises in 2014.

It is well known that the sector benefits from a large pool of freelance workers who operate beneath the VAT registration threshold and/or are working proprietors/owners who are not paid via PAYE. This means that there is likely to be a significant proportion of workers not accounted for in the statistics.

The tables in Appendix 2, 3 and 4 presents further detail on the size of businesses operating in the sector.

Sub-sector profile

The software and electronic publishing sub-sector is the largest sub-sector, in terms of number of businesses in the sector, with just over 5,700 registered enterprises in 2014. This now accounts for 42% of the total number of business in the sector.

Across other sub-sectors there has been wide ranging change in the numbers of businesses. Whilst comparatively small in number, the computer games sub-sector has seen an increase in businesses of 800% to 80, in the same period. Other notable increases include design, increasing by 67% to 2,080. There have, however, been declines in some sub-sectors, with photography and writing & publishing, both seeing the numbers of businesses reduce by 13% (to 350 and 1130 respectively). Further details are provided in Appendix 3.

In some sub-sectors, e.g. music and writing and publishing, self employment and self publishing is a substantial mode of engagement with audiences, enabled by expanding digital platforms.

Employment and self employment

The entire sector accounted for 68,500 jobs in Scotland in 2013, around 2.5% of Scottish employment. Employment in the sector has decreased by 10% since 2009. The creative industries are also characterised by high levels of self-employment and freelance working. Research[3] suggests that, at the UK level, approximately 30% of the creative media workforce is 'freelance', and 44% of those in the Creative and Cultural Skills footprint class themselves as freelance or self-employed[4].

Self-employment is more concentrated in some parts of the sector than in others. In particular, freelance working and self-employment is high in Design, Film, Performing Arts, Visual Arts, Music, Television and Fashion.

As we have seen overall employment decrease, there has been an increase in the numbers of creative businesses in Scotland.

Sub-sector employment

In common with other sectors of the economy, recent employment in the sub-sectors was disrupted due to the effects of the recession.

The largest sub-sector, in terms of employment, is 'software/electronic publishing' accounting for 22,200 jobs, 32% of the sector total. This figure has increased by 10% since 2009. Second, in terms of scale of employment, is 'writing and publishing' with 10,500 jobs in 2013, 15% of the total industry employment, yet having seen the largest sub-sector decrease (down by 27%) since 2009.

During the period 2009 – 2013 there have been decreases in employment across all sub sectors except 'computer games', 'design' and 'music'. Whilst small in scale in comparison with the total sector employment (1.5%), jobs in 'computer games' stood at 1,000 in 2013, having increased by 400% since 2009. Performing and visual art were less affected by change in employment than other sectors, decreasing in number by 8% and 4% respectively.

A full breakdown of employment by sub-sector is provided in Appendix 4.

Location of employment

The sector is represented across Scotland, with employment concentrated in and around Scotland's cities, and most prominently in Glasgow and Edinburgh. Glasgow's sector employment was 17,700 and employment in Edinburgh 13,100 in 2013, comprising 25% and 19% of sector employment respectively. Employment in Aberdeen City follows with 4,500 people working in the sector, 6.6% of total sector employment, with a small decrease (4%) seen in the period. Employment in Dundee City was 2,700, 4.2% of the sector total.

The largest rate of employment growth was found in the Shetland Islands, increasing from 200 to 300 employees (50%) between 2009 and 2013. Declines in employment were seen across most local authority areas, with the greatest proportional declines in Orkney (50%), East Renfrewshire (43%) and Eilean Siar (39%) during the same period.

Data tables relating to this employment information are available in the Appendices.

[3] Creative Skillset, Creative Media Workforce Survey 2014 and Creative and Cultural Skills Sector Skills Assessment 2011.
[4] Creative Skillset's footprint covers film, TV, digital media, writing and publishing and fashion and textiles, while that covered by Creative and Cultural Skills includes architecture, advertising, design, music, performing and visual arts and crafts.

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2 Characteristics of the sector in Scotland continued

Workforce characteristics

Occupational trends

It should be noted that people working in creative related occupations are employed across a range of sectors, not solely in businesses that comprise the creative industries footprint. This accounts for the inclusion of large numbers of workers in ICT and digital occupations. The three largest occupation groupings relating to the creative industries are related to the digital sectors (programmers and software development professionals, IT specialist managers and information technology and telecommunications professionals), accounting for nearly 600,000 jobs and nearly 30% of all creative occupations. This is consistent with the ongoing shift towards digital markets in the creative industries.

Outside of digital related occupations, 'marketing associate professionals' accounts for 168,000 jobs, followed by graphic designers (86,000) and photographers, audio-visual and broadcasting equipment operators (76,000).

Data relating to this occupation data is available in Appendix 5.

Workforce qualification level

The sector also has a highly qualified workforce. As reported by Creative Skillset, 52% of the creative media workforce is in possession of at least an ordinary degree level qualification[5]. This ranges from 64% across the traditional audio-visual sectors to 42% in publishing. A quarter (25%) of the workforce holds a postgraduate qualification.

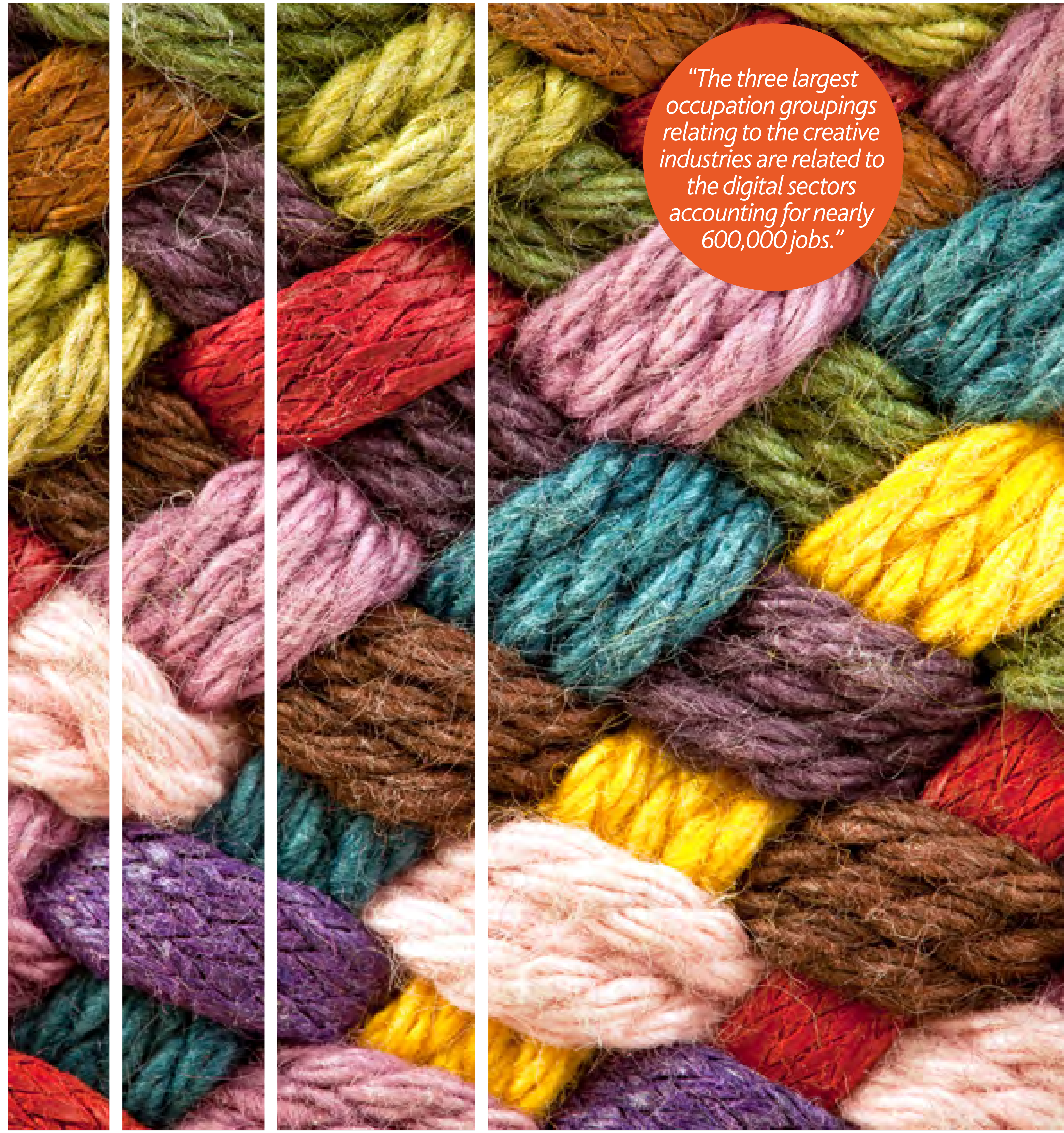
Across Creative and Cultural Skills' (CC Skills) footprint, the story is similar. Two thirds of the workforce in the creative and cultural industries in Scotland (CC Skills footprint) is qualified to degree level or above. This compares to 59% at the UK level, and 41% for the Scottish economy as a whole[6].

Workforce diversity

The Creative Industries are not as diverse as they could be when compared with the general population. Women are less well represented in the creative industries workforce than the economy as a whole. Recent data[7] relating to employment in the digital and creative sectors shows women making up around 38% of the workforce, less than the all sector average of 47%. The picture is similar with respect to those of black, Asian, and minority ethnic origin, accounting for 5.4% of those working in the sector in the UK[8]. These percentages are not reflected in either tertiary education in creative industry subjects or work patterning across the sector.

The Creative Media Workforce Survey 2014 reports that 5% of respondents stated they have a disability. This figure has remained constant since 2010 and is significantly lower than all sector average of the 11%.

The Creative Media Workforce Survey 2014 also reports that 52% of the workforce are aged over 35, which compares to 64% of the UK working population.



[5] ibid
[6] ibid
[7] Sector insights; skills and performance challenges in the digital and creative sector, 2015, UKCES
[8] Creative Skillset Employment Census of Creative Media Industries, 2012

2

Characteristics of the sector in Scotland continued

Exports

In 2012, Scotland's Creative Industries produced £1.52 billion in exports of goods and services to the rest of the UK and a further £0.92 billion internationally, around 3.5% of Scotland's total international exports in 2012.

Social and cultural contribution

Beyond the economic and labour market data presented in this section, it is well recognised that the creative industries make an important contribution to the social and cultural life of Scotland, to the health of businesses in the supply chain, and to Scotland's position in the global environment. A full discussion of these aspects is beyond the scope of the SIP, however, from a skills perspective there are a number of aspects it is important to recognise here.

The Economic Contribution Study: the Arts & Creative Industries in Scotland (Creative Scotland & Scottish Enterprise, 2012) estimated that the sector generated an additional £3.06 billion in turnover in indirect impacts (i.e. supply chain effects) with the largest contributors to this being Writing & Publishing followed by Software/Electronic Publishing and Radio & TV.

The same study also highlighted that Scotland's Creative Industries work both directly and indirectly in boosting tourism by attracting day and overnight visitors, with the strongest effects being in the Heritage and Performing Arts sectors. Tourism expenditure of over £1 billion can be ascribed to overnight tourism motivated by the Creative Industries, and this gives rise to a direct GVA of £280 million.

Additionally, the research also established from the CIPFA Cultural Statistics in Scotland, 2013 that creative and cultural industries related expenditure with a direct value of almost £200 million. These values are in addition to those reported earlier. Scotland's third sector is also a key player in engaging communities in the world of the arts and creative and cultural activities as future makers and audiences.

In relation to current developments and trends in the sector, Creative Scotland's companion piece on the Creative Industries (2014) emphasises that: "increasingly a much wider range of creative professionals including visual artists and dance, music and theatre practitioners are looking at ways to protect and exploit their ideas and intellectual property to bring in new income streams, joining the growing cluster of creative industries assertively and productively contributing to both creative and economic success. Working in this way, artists and creative practitioners are blurring the lines between art forms and creative industries. They are innovating creatively through digital technology and collaborating with other specialists across the creative and artistic spectrum; making old definitions defunct and challenging us to think outside of the traditional funding parameters."

The varied character of the sector is described in the City and Region narratives offered throughout the SIP.

Case study: Glasgow

Glasgow has long been home to the largest concentration of creative industries in Scotland, with almost 2,000 creative businesses and 17,000 people directly employed in the sector. It is the centre of Scotland's broadcasting industry, with BBC Scotland, STV and Channel 4 all located in the city, and a thriving community of production companies and freelance screen talent operating across television and film production. The city is also a popular location for international production, bringing more than £20m to the city in 2013.

While commissioning bodies such as the BBC have long acted as a magnet for the creative sector in Glasgow, the city's cultural infrastructure is also a major factor. The city is home to four of Scotland's national performing arts companies – Royal Scottish National Orchestra, Scottish Ballet, National Theatre of Scotland and Scottish Opera. And the world renowned Glasgow School of Art and the Royal Conservatoire of Scotland, together with three other universities and three colleges, all have specialisms in culture and the creative industries. Performing arts attendance in the city increased by more than 80% since 1992, underlining the city's commitment to cultural industries.

There is also a growing creative services sector in the city covering design, architecture, advertising, PR and events and Glasgow is a UNESCO City of Music, reflecting its long heritage in music production and promotion. Linked to the city's strengths in design, creativity and technology, a small but thriving digital media sector has emerged, led by animation and design companies working on national and international commissions for blue chip clients.

The other narrative for Glasgow's creative industries is that of the visual arts. Glasgow School of Art has long produced world leading talent in fine art and design, with graduates dominating recent Turner Prize awards. Indeed, Glasgow will play host to the Turner Prize in 2015, recognition of the city's reputation as a centre for artists, and dynamic social enterprises such as WASPS, the UK's largest provider of artists' studios, offer high quality workspace and studios for artists and small creative businesses in the city.

The Creative Clyde network promotes Glasgow's growing cluster of creative and technology companies with a focus on hot spots in the Merchant City and around the River Clyde, particularly at Pacific Quay. Pacific Quay is now a growing hub for Glasgow's creative community, with BBC Scotland, STV, Glasgow School of Art's digital design studio, Raise the Roof Productions and Film City Glasgow all located in the area.

Glasgow School of Art

Case study: Dundee

Dundee is synonymous with Scotland's computer games industry, and is the original home of the world leading Grand Theft Auto games franchise, first developed by DMA Design in the city. The University of Abertay Dundee was the first in the UK to offer dedicated courses in computer games development and remains a major driver of the digital sector with a reputation for innovation.

But Dundee is not just about the games sector. There are more than 350 businesses in the creative sector in the city, employing more than 3,300 people and generating turnover in excess of £185 million[7], including global publishers DC Thomson.

It is also a city in transformation, with a £1 billion project to reconnect the city to the waterfront to transform the city into a world leading destination through the enhancement of its economic, physical and cultural assets.

At the heart of the Waterfront plans is the new Victoria and Albert (V&A) Museum, an international centre of design for Scotland. It will play a vital role in Dundee's ambitious plans for regeneration, symbolising the city's high aspirations. The Seabraes Yard area of the Waterfront is also developing as a hub for digital media businesses with the new District10 incubator space and a cluster of digital companies in Seabraes House.

Also based in the city, Design in Action is a £4.5m four year research and knowledge exchange programme focused on integrating design into business. It is a national network of organisations (academia and industry) led by the University of Dundee and will research, develop and evaluate new products, processes and services through the strategic application of design principles. It is one of only four such hubs in the UK.

These achievements have all led to Dundee being recognised recently as a UNESCO City of Design.

Dundee Waterfront

[7] Data from Dundee City Council (Future Cities Demonstrator Application to the Technology Strategy Board, 2013)

3 Skills demand

The review of labour market intelligence and research and engagement with industry and key stakeholders has identified a range of key skills issues and challenges for Scotland's creative industries sector.

Broadly, these include:

- a need to build more practical and work-based learning into courses to support readiness of new entrants
- demand for digital skills in relation to design capability, use of technology to support creative storytelling, and in business practice
- the centrality of enterprise and entrepreneurship to develop sustainable creative businesses and underpin successful freelance careers in the sector
- the importance of communication skills across all sectors
- demand for strong leadership, innovation and business skills, particularly in senior roles in the sector to facilitate growth and sustainability.

There is a strong consistency and consensus around these issues, and clear linkages across and between them supporting the adoption of a high-level strategic perspective. This approach to drawing out overarching themes supports the creation of a framework for change for the sector as a whole.

Future demand

There is no single, agreed and overarching source of forecast data for the creative industries, making it challenging to scope future employment demand, it is therefore necessary to synthesise information from a range of available sources[9].

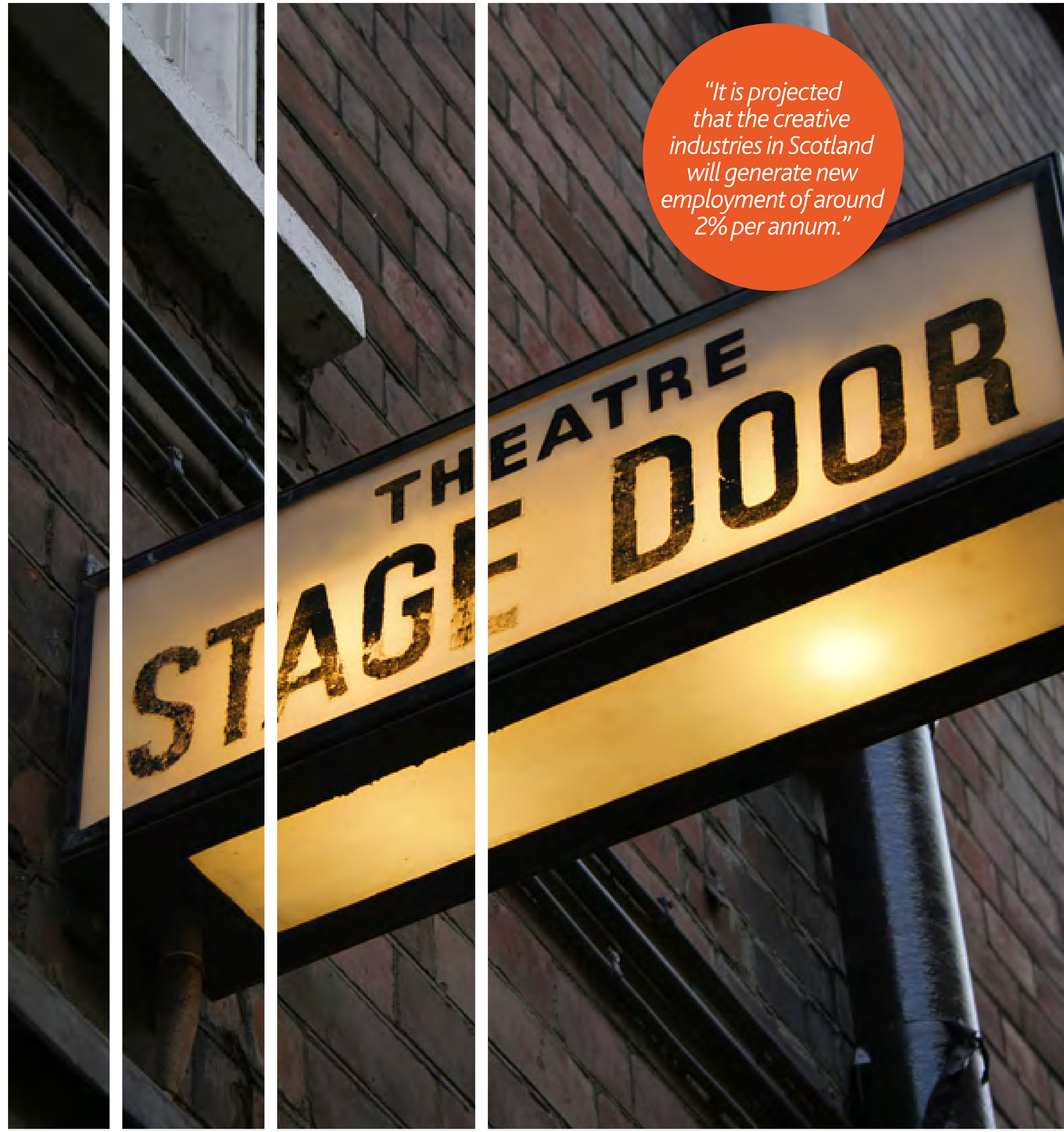
Taking this approach, it is projected that the creative industries in Scotland will generate new employment of around 2% per annum over the next 10 years. This will result in around 13,000 new jobs over the period (1,300[10] new jobs per annum) across Scotland.

Replacement demand is projected to be around 30,000 over the 10-year period (3,000 per annum), therefore, total annual demand (new and replacement) is estimated at 4,300, and therefore 43,000 over a 10 year period.

UKCES Working Futures 2013 suggests potential growth between 1.5% and 2.5% between 2015-2020 across media, information technology and arts and entertainment sub-sector groupings, with most jobs being driven by replacement demand.

Demand is likely to be at the higher-level occupations (professional, managerial technical) with other occupations predicted to show no significant change or new demand. The specific skills factors/ issues highlighted across the research include: business and management skills; ICT/ digital skills; higher-level technical skills; and marketing and sales.

The lack of more robust forecast data available to present in this SIP presents a challenge to industry to more accurately articulate its future skills and employment demand to the skills system.



"It is projected that the creative industries in Scotland will generate new employment of around 2% per annum."

[9] An analysis of the skills needs of the creative and cultural industries in Scotland, Creative and Cultural Skills, April 2011; Sector Skills Assessment for the Creative Media Industries in the, Creative Skillset, UK 2011; Sector Skills Assessment for the Creative Media Industries in Scotland, Creative Skillset 2011;Sector Skills Insights: Digital and Creative Evidence Report, UKCES, 2012; Sectoral Report August 2012 Working Futures 2010-2 (UKCES)

[10] Based on current employment estimates

3 Skills demand continued

Skills shortages & gaps

The availability of robust, current skills shortages and gaps data has been a challenge for skills planning for Scotland's creative industries. This has very recently been strengthened through the UKCES sector insights publication for the digital and creative sectors, presenting a new analysis of data available for these sectors. Whilst our analysis draws on the earlier research undertaken by sector skills councils, given the timing of this publication, the trends outlined below are supported by this recent report. Most importantly, the key messages we present here are supported by our consultation and ongoing engagement with industry.

The most recent Creative Skillset research (Employer Skills Survey of 2010) found that 28% of companies in the creative media industries also reported skills gaps within the existing workforce across the UK, with a slightly higher portion of Scottish employers (31%) reporting such gaps[11]. Skills gaps were most commonly reported in relation to sales and marketing (61%), technical skills (48%) and skills in using software applications (46%). Skills gaps were most commonly reported in businesses involved in film and television production and broadcasting. Nearly half of employers from Scotland with vacancies (42%) say that some of them are hard to fill due to applicants not having the right skills or experience.

In the same research, the most commonly reported effect of skills gaps is delays to developing new products or services (reported by 63%), followed by outsourcing work that would preferably be done in-house (48%), increased operating costs (47%), and losing business or orders to competitors (43%). Only 1% of employers say their skills gaps have not caused any problems.

In the creative and cultural sectors alone, almost half (45%) have experienced an increased workload for others, a quarter (26%) have lost business and a fifth (17%) have needed to turn business away as a result of skills shortages and gaps.

These trends point to a need for the industry to proactively engage and invest in workforce planning development, both in securing the future pipeline of talent and in maintaining and upskilling existing workers. In the creative industries this responsibility lies across the range of employers; from micro businesses and SMEs, to large scale organizations operating as employers and purchasers of talent across the UK and internationally, and, individuals operating on a freelance basis.

Demand and expectations at entry level

There is demand for people with communication and team working skills alongside enthusiasm and an open and engaged approach to ongoing learning. Our engagement with employers suggests there is some concern about the level of these capacities amongst college and university leavers. In contrast, employers express satisfaction with the general technical competences of graduates, given they have been developed in an academic environment. They do, however, expect to develop new entrant capabilities in the workplace.

With this expectation of the skills system, the industry has a responsibility to offer paid entry level opportunities that support individuals to develop their skills to progress in the sector. This is an area of interest to all in the sector and is in line with the calls for fair and inclusive workplace practice in Scotland's Economic Strategy.

Digital & computing skills

Employers report that digital skills cut across all parts of the creative industries and are driving the sector. The rise of new digital platforms is constantly transforming the production processes and the business models that support industry growth.

Similarly, the expanding breadth of digital technologies creates opportunities for creativity, both in design of the technology itself, and in the development of new products, goods and services, and forms of practice.

Our engagement with industry indicated that, at the entry level, new entrants need awareness of the digital environment alongside well-developed skills in working across digital platforms. At senior management levels, there is a clear need for understanding of the commercial opportunities of digital exploitation and how to plan, secure and deliver resources to maximise them. Digital skills should therefore be a core or fundamental skill set across all parts of the sector. This is common to many sectors of the Scottish economy, as identified through several Skills Investment Plans to date. There is an opportunity to explore how action relating to this common issue can be aligned.

Enterprise & entrepreneurship

Unlike many other sectors, the creative industries have quite high levels of start-up, self-employment and freelancing and are generally characterised by higher levels of entrepreneurship.

The has emphasised the importance of enterprise and entrepreneurship skills as a key factor in determining the rate and scale of growth. Individual marketing and networking, alongside qualitative technical and creative abilities, access to technologies, market credibility and no-risk delivery are key drivers for securing business.

For many seeking to enter the creative industries, running and building up a business are core competences. Understanding how these traditional business functions operate in and support the digital economy are now essential.

Stronger entrepreneurship education is needed to equip graduates with the skills to create commercial opportunities for themselves, and to contribute to the growth of larger, more sustainable businesses. Access to continuing professional development at a time and cost that can be supported by their businesses is an ongoing imperative for all.

Industry's ambition here is to ensure that those entering the creative industries do so with the skills to sustain and grow their businesses – resulting in fewer business failures and more large businesses able to make a bigger and sustainable contribution to the Scottish economy.

[11] Skillset Employer Survey 2010

3 Skills demand continued

Business skills
Employers also recognise the need across the sector for a range of business and management skills including:

- management and leadership
- business planning
- project management
- strategic thinking
- marketing
- innovation
- financial planning and management
- intellectual property management and exploitation
- HR and strategic skills.

In this sector, with the high incidence of micro businesses and self-employment, owners/practitioners often have a number of roles, often acquiring management and business skills, as situations demand them. Creative leaders, creative and cultural agencies and company boards are also often in need of management development and encouragement to prepare for growth and succession planning.

For those already in employment, there are currently few flexible options and it is recognised that access to continuing professional development (CPD) for those already in management is critical, as this will drive and support future growth. There is also a strong view from industry that general management training was not appropriate for the sector either in content or delivery channels and that a more tailored approach would be needed. Currently, too little is thought to be available, and is neither broadly known nor trusted by the sector.

There is also a need for strong project management skills across a range of sub-sectors: TV and film, design, performing arts, events, digital media agencies and fashion all identify a need for high level project management skills to bring productions and projects in on time, on budget and to the highest quality. Allied to this, there is demand for specialised business executive and administration skills areas such as production accounting, talent management & contracting, and production co-ordination.

Drivers of change
The dynamic nature of Scotland's Creative Industries means there is a drive and appetite for new products and services from new and rapidly changing audiences and markets. This is matched by a demand for innovative processes and more effective and responsive business models to deliver them. In addition, there are a number of wider economic and industry trends that currently impact on the sector. These drivers stimulate the skills needs of the sector to enable its competitiveness in a global market place, supporting innovation and responsiveness to customers and audiences, and to the ensure the continuing sector's role in civic life in Scotland. The implications of these drivers on skills needs are highlighted in Table 3.1.

Table 3.1: Drivers of change

Driver	Description
Expansion and application of digital technologies	Recent forecasts from Price Waterhouse Coopers indicate that global growth in the entertainment and media industries will be driven by digital, with compound annual growth rates approaching 12%[13]. For the creative industries, this requires that the workforce has the skills and imagination to engage with and develop this technology further to support further growth and competitiveness, including expanding audiences. Digital convergence therefore opens up significant opportunities for organisations to develop new business models, and to offer new products and services, while challenging previously stable business models in new and innovative ways. An example of this in Scotland's creative industries would include book publishing, where new printed titles are also developed as audiobooks and digital downloads; marketing and audience development activity is extended through online social media, reading groups, invited access to "freemium" events such as readings, book festivals and localised discounting via new online, digital channels on TV, PC, Tablet and Smartphone.
Internationalisation	The truly global market place in which Scotland's creative industries operate requires businesses and freelancers to have the skills and knowledge to engage with markets across the world, including market analytics, sourcing and contracting agents, international fabrication and distribution, communication and marketing. To build large global audiences Scotland's creative industries need to develop approaches to storytelling that reach a broad population. The international nature of many sub-sectors presents some challenges and opportunities in accessing available skilled labour when workers are abroad on projects.
Intellectual property	The protection and exploitation of Intellectual Property (IP) is an issue of ever-growing importance for the creative industries in the digital age, particularly given its focus on innovation. Concerns have been voiced that a failure to review and adapt existing copyright and protection laws in particular could impact upon the ability of both the creative industries, and the wider economy in the UK, to adapt and compete in the future. In copyright, the interests of the UK's creative industries are of great national importance. Digital creative industries exports rank third, only behind advanced engineering and financial and professional services. In order to grow these creative businesses further globally, they need efficient, open and effective digital markets at home, where rights can be speedily licensed and effectively protected.
Scotland's creative/ cultural brand	Scotland's cultural heritage and creative industries are a core component to how Scotland presents itself to the world, supporting tourism and the wider cultural currency of the nation internationally. In terms of skills, the development and maintenance of traditional craft skills is important not only in maintaining this position but in ensuring the longevity of traditional communities and heritage. There is an opportunity in this respect to harness the potential brought by new technologies and processes to bring these traditional products to new markets and audiences, and to bring innovation into their design and manufacture.

[13] Global Media and Entertainment Outlook 2013-2017, PWC, 2013.

Case study: Edinburgh

Edinburgh is the world's leading festival city with a year round programme of 12 festivals generating in excess of £200m for the city economy and is home to the second largest concentration of creative industries in Scotland. The cultural infrastructure of the city is strong with world class galleries and museums, and a vibrant arts sector, and the city is home to the Scottish Chamber Orchestra.

As the political centre of Scotland and the focus of the financial service industry, Edinburgh has long been the centre of the creative services and marketing communications industries in Scotland. Leading agencies such the Leith Agency and The Union consistently compete for business from global brands such as Honda and Carling and are at the centre of a broader sector known for its creativity. Design is also growing in the city, both graphic and product design, and as a UNESCO World Heritage Site, Edinburgh has always attracted global architecture practices.

The digital and technology sector is also strong, with global leaders such as Rockstar Games (the developers of the Grand Theft Auto games franchise) and Skyscanner, as well as an active startup scene based around the University of Edinburgh's world leading School of Informatics, the largest informatics centre in Europe. The city's three universities produce more than 1,200 computer graduates every year.

Edinburgh was also the world's first UNESCO City of Literature in 2004, and is home to the Edinburgh International Book festival, the National Poetry Library, the Scottish Storytelling Centre and the Scottish Publishers' Association as well as a host of authors including JK Rowling, Ian Rankin and Alexander McCall Smith. Canongate Publishing, famous for the Booker Prize winning Life of Pi, continues to lead the Scottish publishing industry through its innovation.

In addition to the School of Informatics, Edinburgh University has strong academic traditions in areas relating to the creative industries, not least through the Edinburgh College of Art, and Edinburgh Napier University is host to the Institute for Creative Industries offering a range of courses and research activity in areas such as music, design and screen industries.

Creative Edinburgh is an active network for creative businesses and practitioners across the city and is a key part of a growing infrastructure supporting the sector. This also includes the Creative Exchange, a business incubator supported by Edinburgh City Council and offering low cost space and support for start-up and early stage creative companies.

Fringe Festival, Edinburgh

Case study: Aberdeen

The Creative Industries in the North East of Scotland employ 6,000 people in just over 1,550 businesses. This equates to 9% of total employment in the creative industries in Scotland and 13% of the total number of creative industries businesses.

The sector generates annual revenues in excess of £600m, and GVA of almost £373m. Productivity is high compared to the rest of Scotland. Aberdeen City accounts for more than two thirds of the jobs in the sector and a similar proportion of annual revenues.

The sector has a different character and structure to that seen elsewhere in Scotland. While Glasgow has broadcasting, Dundee is strong in digital media and Edinburgh is creative services driven, the North East appears to be strong in design – architecture, design and fashion are all important components of the local creative economy, as is visual art and to some extent advertising. There are also strengths in industrial design related to the oil and gas sector.

The arts sector in the region is strong at the grass roots end and has an important role in the development of rural communities across the region. However, there are gaps in the cultural infrastructure. There is, for example, no producing theatre, and no signature events or assets.

Both of Aberdeen's universities, Robert Gordon University and the University of Aberdeen, have strong course provision in areas relating to the creative sector, and RGU in particular, which includes Gray's School of Art, has a high proportion of students in subjects related to the creative industries including arts and design, event management and digital media.

Industry engagement suggests that high costs in Aberdeen and the lack of regular work opportunities contributes to the region's difficulties in retaining creative talent and while there is a strong creative services sector focussed on the energy industry, this has a low level of public visibility.

Aberdeen recently bid to become the City of Culture but was unsuccessful. However, the process has reinvigorated civic interest in the creative sector and a recent report by RGU, Creating a New North: a vision for the region's cultural future, has set out a new ambition for culture and creativity in the North East.

Aberdeen Exhibition and Conference Centre

4 Current provision

Creative Industries related subjects consistently enjoy high levels of popularity among students.

However, there has been a decrease in numbers of students in the college sector and a marginal decrease in Higher Education (HE) institutions. Employment rates for creative industries graduates are below the average across all subjects, with many graduates moving to find work in the south east and north west of England.

In recognition of the broad value of creativity in society, creative disciplines are significant in Scotland's schools and the principles of creativity and creative learning are embedded in the Curriculum for Excellence. There is significant partnership work underway to develop new definitions and standards of practice relating to workplace learning, work experience and employer engagement. Scotland's Creative Learning Plan, led by Creative Scotland with Education Scotland and SDS, seeks to promote creativity across all learning, attainment and work for Scotland's young people. This work is at an early stage and will impact on the role and perceived value of creativity and work based learning in the education system and with all employers.

Modern Apprenticeships

MA starts

Since 2009/10 there has been an increase in the number of starts to Creative Industries MAs due to the creation of new frameworks in this area. Over the past three years (since 2011/12) the number of starts has remained between 250 – 300, with a slight decrease (10%) in starts in 2013/14 compared to 2011/12. The introduction of the Fashion and Textile Heritage framework in 2011/12 accounts for the observed increase in starts. See Table 4.1.

MAs in training

There were relatively large increases in trainee numbers in 2011/12 due to the introduction of the Fashion and Textile framework. There are 27% fewer MAs in training within creative frameworks in 2013/14 compared to 2011/12.

The increase in the MA programme, and creation of new frameworks presents an opportunity for growth in MAs as an entry route and workforce development solution for the sector. However, the structure of the business base, with the high proportion of micro and small businesses, does present a challenge to some employers and the skills system to more fully engage.

Students in Scotland's Colleges

As of 2012/2013, there were 48,838 students studying a Creative Industries related course in the college sector marking a decrease of 2,392 students (5%) since 2006/07.

The following analysis was developed from a bespoke list of creative industries related courses. This includes students studying courses such as 'IT: Computer Use' 'Information Systems/ Management' and 'Using Software and Operating Systems', which were not previously offered – students studying these subjects total 18,744 (of which IT: Computer Use accounts for over 14,500).

Excluding these students (i.e. in a direct comparison with 2006/2007, gives a total of 30,094 college students studying a creative industries related course. This marks a decrease of over 21,000 students (41%) since 2006/2007.

Table 4.1: Number of MA starts 2009-2014

Frameworks[14]	2009/10	2010/11	2011/12	2012/13	2013/14
Creative & Cultural Skills*	7	53	42	51	45
Creative & Digital Media	0	0	0	16	14
Fashion & Textile Heritage	0	0	105	140	126
Grand Total	**7**	**53**	**147**	**207**	**185**

Table 4.2: Achievement rate

The achievement rate has been relatively high over the past two years when compared to the all framework average of 77% (2013/14 and 2012/13).

	2009/10	2010/11	2011/12	2012/13	2013/14
Achievements	0	20	33	141	159
Leavers	0	27	48	173	185
Rate	**n/a**	**74%**	**69%**	**82%**	**86%**

Table 4.3: MA starts by gender

Females account for 41% of starts in 2013/14, 5% more than the previous year.

Year	Female	Male	Grand Total	% Female	% Male	Total
2009/10	3	4	7	43%	57%	100%
2010/11	29	24	53	55%	45%	100%
2011/12	57	90	147	39%	61%	100%
2012/13	78	129	207	38%	62%	100%
2013/14	75	110	185	41%	59%	100%

* The 2009/10 data includes 7 starts that were part of the original pilot to scope the MA framework.

14 The framework groupings identified in this analysis are those deemed to most directly align with Scottish Government's key sector definition, as described at the beginning of this document. Therefore, frameworks less directly associated with the sector and its supply chain are not included in this analysis.

4 Current provision continued

However, some 35% or around 11,000 students of the total of 30,094 are studying at level SVQ3 and above – much higher than the same figure for all courses (21%). Non-vocational courses account for a sizable proportion of students undertaking creative industries courses – 28% undertake courses with no recognised qualification (compared to 26% across all subjects). It should be noted that 'no recognised qualification' may, in some instances, mean professional qualifications not recognised by SQA.

On reviewing the latest FE admission figures, there has been a significant decline over the past eight years in full and part-time student numbers across a broad range of creative arts, crafts and performing arts subjects.

A proportion of this reduction can widely be accounted for by removal of funding for 'leisure' courses, in line with Scottish Government policy.

Some of the largest decreases in student numbers have been in subjects such as[15]:

- Dance
  (decrease of 80% - 3,113 students)
- Music performance
  (69% - 2,964 students)
- Art technique/practice
  (49% - 2,534 students)
- Art studies/fine arts
  (54% - 1,680 students)
- Crafts: leisure/general
  (90% - 1,309 students)
- Glass/Ceramics/Stone Crafts
  (77% - 277 students).

For more detail see Table 4.5 on page 34.

These are viewed by the industry as fundamental subjects to the development of artistic, aesthetic and cultural practice. At this level, these courses are the first platform for inclusive and diverse engagement in creative fields, providing key building blocks to the development of the crafts practitioners, designers, visual artists and performers of tomorrow.

Mode of study

Full-time provision accounts for a greater proportion of creative industries students in colleges (35%) than of all students (33%). Since 2006/2007, there has generally been a move away from part-time study[16] in favour of full time study; part-time study now accounts for just 40% of students, compared to 66% in 2006/2007. Flexible learning has increased substantially over the period, with 17% of students now studying on this basis, compared to just 2% previously.

Courses predominantly attended on a full-time basis include:

- Design (77% attend on full-time basis)
- Music performance (77%)
- Computer programming (72%)
- Fine arts (65%)
- Theatre and dramatic arts (63%)
- Communication/media (62%).

Table 4.4: Change in total student numbers (PG & UG) by subject, 2006/07 - 2012/13

Subject	2006/2007	2012/2013	Change	% Change
Archaeology	450	376	- 74	- 16%
Architecture	2925	2,568	- 357	- 12%
Artificial intelligence	150	310	160	106%
Broadly-based programmes within architecture, building & planning	0	8	8	-
Building	2,990	1,481	- 1,509	- 50%
Cinematics & photography	715	1,124	409	57%
Computer science	8,085	5,215	- 2,870	- 35%
Crafts	55	128	73	133%
Dance	0	32	32	
Design studies	3,295	3,993	698	21%
Drama	855	1,004	149	17%
Fine art	1,455	1,393	- 62	- 4%
Imaginative writing	145	105	- 40	- 28%
Information systems	1,860	1,216	- 644	- 35%
Journalism	710	860	150	21%
Landscape & garden design	185	171	- 14	- 8%
Marketing	2,175	2,294	119	5%
Media studies	1,135	1,390	255	22%
Music	1,665	1,808	143	9%
Others in architecture, building & planning	30	112	82	273%
Others in Computer sciences	0	93	93	-
Others in creative arts & design	1,045	435	- 610	- 58%
Planning (urban, rural & regional)	1,120	637	- 484	- 43%
Publicity studies	590	333	- 257	- 44%
Publishing	340	113	- 228	-67%
Total	**31,975**	**27,197**	**- 4,778**	**- 14.9%**
Total across all subjects	**221,075**	**193,639**	**- 27,436**	**- 12.4%**

Source: HESA 2012/13.

[15] Analysis based on HESA statistics.
[16] Comprised of Part-time (day release), Other Part-time, Evening and Weekends only, and Part-time but previously met full-time criteria).
[17] Creating Prosperity: the role and contribution of higher education to the UK creative economy, EKOS (2010).
[18] The subjects included in this classification include skills seen as important to the sector, and not just 'creative' courses, and is based on the classification developed in a study for universities UK in 2010.

4 Current provision continued

Students in the University Sector

For the purposes of this analysis, a bespoke list of Higher Education (HE) subjects was created to include those relating to the skills required in the creative industries. The classification is based on the Joint Academic Classifications System (JACS) and was first developed in a study for Universities UK in 2010[17]. For the academic year 2012/2013, there were just over 27,000 students undertaking a creative industries related course[18] in Scotland – this represents 14% of all those studying within Scotland, and includes both undergraduate and postgraduate students.

The total number of those studying a CI related subject has decreased by 14.9% since 2006/2007, which is slightly higher than the decrease of all students studying in Scotland across the same period (12.4%).

The most popular subjects (by student numbers) were computer science (19% of creative industries related students) and design studies (15%). Broader subject themes such as creative arts and design (37%) and computer science (25%) accounted for some of the largest student numbers.

Some of the largest decreases have been in computer science and related courses (a decrease of 32%, 3,262 students) and in building and architecture (also 32% - 1,866 students). Conversely, there has been growth in creative arts and design over the period (9%), with over 10,000 students studying related courses in Scotland.

Level and mode of study
Just under one-quarter (22%) of those studying creative industries related subjects are doing so at a postgraduate level – this is lower than the same figure for postgraduate study across all subjects (28%). The most popular areas are creative arts & design and computer science, which are studied primarily by first-degree students (86% and 78% respectively).

There are two subject areas – publishing and imaginative writing – which are studied by postgraduate students only, albeit in relatively low numbers (113 and 105 students, respectively).

The majority of creative industries students are engaged in full time learning, as opposed to part-time, (91%). This is higher than the rate across all subject areas (83%).

Student characteristics
There are slightly more male CI related students than female (52% to 48% at both postgraduate and first degree levels of study).

Almost two-thirds of those studying CI related subject in Scotland are from Scotland (65%), with little difference between those coming from the rest of the UK, the EU, and outwith the EU. It is interesting to note that only 12% of those studying at postgraduate level are from Scotland, particularly in comparison to the proportion of non-EU postgraduate students studying in Scotland (70%). This is likely a reflection of the economic appeal of non-EU postgraduate students, and recruitment efforts on the part of Scottish HEIs.

Given the predicted demand for replacement of the senior creative, managerial and technical roles across Scotland's creative industries, there may be a question regarding the scope of opportunity for suitably qualified resident talent.

Creative Industries graduates & employment

In 2012/13, 5,440 graduated from Scottish HEIs in a Creative Industries discipline (16% of all students). In some sub-sectors, 40% of Scottish graduates find work in London, the South East and North West of the United Kingdom[20].

Recent analysis by NESTA shows that 58% of those working in the UK creative economy have a degree qualification compared to 38% for the economy as a whole, demonstrating the importance of HE provision as part of the skills mix.

In the same period, 24% of all unemployed graduates (1,800) six months after completing their studies had taken a Creative Industries (CI) Degree. Of the 25,040 graduates who found employment within six months of graduation, 16% - 3,910 – were CI graduates. CI graduates account for a significantly larger share of those who are forming a professional portfolio/creative practice (56% of all graduates employed); are self/employed/freelance (44%); or starting their own business (34%), than of their share of total graduate employment.

It is difficult to draw any definitive conclusion about this, but it raises a question about the flexibility of CI related degree courses. There appears to be industry demand for greater multi-disciplinary skills; and scope for greater participation by women and other groups under represented in the sector. This presents a challenge to the education system and funders to respond to the demand for more flexible and responsive provision.

Other supply activity

There are many initiatives underway to support skills in the sector, some examples are given here as illustration.

Scottish Funding Council has provided funding to the Royal Conservatoire of Scotland to support the delivery of the Scottish Drama Training Network and via Glasgow Clyde College, the Council alongside Skills Development Scotland and the enterprise agencies fund the Scottish Textiles Skills Partnership which focuses on addressing textiles and leather manufacturing skills needs. Additionally, Heriot-Watt University has also been supported by the Council to lead on the Textiles Future Forum.

Scottish Funding Council has also recently approved a three year investment via the University of Abertay to the Creative Skillset Scotland Media Academy Network of Excellence, which has been established to provide greater linkages between industry and member institutions, and will contribute to addressing the work placement and graduate destination issues identified in this SIP.

This project and others will be encouraged to formally link with the objectives of the Creative Industries Skills Plan and will be given the opportunity to report on these linkages with the Creative Industries Skills Forum.

There has been a reduction in recent years of the impacts and relationship of the industries themselves in delivering their own responses to tackling issues of job segregation, work returners and continuing professional development in a highly fragmented and casualised workforce. The introduction by Scottish Government of the new £1m Scottish Screen Industries Skills Fund managed by Creative Scotland in association with Skills Development Scotland is a significant step forward.

[20] HESA DLHE Survey and Student Record 2012/2013

Table 4.5: Change in FE student numbers by subject, 2006/2007 – 2012/2013

Subject	2006/2007	2012/2013	Change	% Change
Art Studies/Fine Arts	3,120	1,440	- 1,680	- 54%
Arts/Culture/Heritage Administration	17	21	4	24%
Art Techniques/Practice	5,135	2,601	- 2,534	- 49%
Audio and Visual Media	1,430	942	- 488	- 34%
Building Design/Architecture	217	332	115	53%
Built Environment (general)	796	853	57	7%
Communication Skills	2,170	1,470	- 700	- 32%
Communication/Media (general)	1,652	1,283	- 369	- 22%
Crafts: Leisure/General	1,459	150	- 1,309	- 90%
Cultural/Area/Social/Diaspora Studies	710	69	- 641	- 90%
Culture/Gender/Folklore	185	160	- 25	- 14%
Dance	3,911	798	- 3,113	- 80%
Decorative Leisure Crafts	386	34	- 352	- 91%
Decorative Metal Crafts/Jewellery	758	577	- 181	- 24%
Design (non-industrial)	1,191	978	- 213	- 18%
Fabric Crafts/Soft Furnishings	828	90	- 738	- 89%
Film/Video Production	518	604	86	17%
Fashion/Textiles/Clothing (craft)	2,097	1,854	- 243	- 12%
Glass/Ceramics/Stone Crafts	359	82	- 277	- 77%
Interior Design/Fitting/Decoration	490	651	161	33%
IT: Computer Science/Programming/System	3,609	2,483	- 1,126	- 31%
Information Systems/Management	-	261	261	-
IT: Computer Use	-	14,582	14,582	-
Journalism	198	91	- 107	- 54%
Literature	272	359	87	32%
Marketing/PR	1,162	1,024	- 138	- 12%
Music History/Theory	75	103	28	37%
Musical Instrument Technology	1,194	535	- 659	- 55%
Music of Specific Kinds/Cultures	461	190	- 271	- 59%
Music Performance	4,277	1,313	- 2,964	- 69%
Performing Arts (general)	1,539	1,331	- 208	- 14%
Photography	3,453	2,909	- 544	- 16%
Print and Publishing	225	333	108	48%
Property: Surveying/Planning/Development	36	92	56	156%
Software for Specific Applications/Industries	1,489	580	- 909	- 61%
Theatre and Dramatic Arts	1,689	1,246	- 443	- 26%
Theatre Production	214	322	108	50%
Text/Graphics/Multimedia Presentation Software	3,174	1,892	- 1,282	- 40%
Using Software and Operating Systems	-	3,901	3,901	-
Wood Cane and Furniture Crafts	188	65	- 123	- 65%
Writing (authorship)	546	237	- 309	- 57%
Total	**51,230**	**48,838**	**- 2,392**	**- 5%**
Total without new subjects	**51,230**	**30,094**	**- 21,136**	**- 41%**
Total across all subjects	**320,817**	**269,050**	**- 51,767**	**- 16%**

Source: HESA 2012/13.

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5 Key challenges, priorities and Action Plan
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Case study: Highlands & Islands

Inverness
As the Highland capital, Inverness is a natural concentration for creative industries, and home to cultural venues such as Eden Court and the music venue Ironworks. The region is strong in sectors such as crafts, music and designer fashion as well as publishing, and has growing capacity in screen production, film and TV, and digital media.

The annual XPONorth festival has grown into a leading industry event, attracting delegates globally for two days of conference talks and showcases, while the network of creative industries expands and contracts as required, creating opportunities for freelancers and local suppliers.

The region also benefits from a number of active trade networks in music, writing and publishing, fashion and textiles and screen industries, initially established by Highland and Islands Enterprise (HIE) to support collaboration, international trade and promotion.

A new strategy for the creative industries in Highlands and Islands was launched in December 2014 supported by £2.3m of new investment from HIE.

Shetland
Creativity and innovation has always been at the heart of the Shetland community. The islands have a particularly strong textile heritage, ranging from modern factories producing machine-made garments by modern designers to hand-knitters using traditional patterns.

Music is also a big part of the island's cultural identity, with the number of events and festivals being bolstered in 2012 by the opening of Mareel, the UK's most northerly music, cinema and creative industries centre, operated by Shetland Arts Development Agency.

Offering a host of facilities, Mareel provides a year-round programme of film, live music, education and other performance events. Coupled with the new Chair of Creative Industries post, funded by Shetland Islands Council and Highlands and Islands Enterprise, whose remit includes developing the economic base of the creative industries in the isles, Shetland has the potential to build a reputation as a thriving cultural landscape.

Western Isles
There is a strong foundation of community and enterprise embedded in the cultural history of the Western Isles. In particular, the world-renowned Harris Tweed has been produced here since the 17th century and remains part of the islands' cultural identity, with three mills currently in operation.

The Outer Hebrides Creative Industries Strategy found that creative and cultural industries in the islands supported 500 jobs and added more than £33 million to the local economy, with the opening of the Creative Industries and Media Centre (CIMC) in a former Harris Tweed mill in 2012 providing a further boost.

The £2.6m development offers hot desks and facilities for creative businesses and freelancers, in addition to office and production-related space for MG ALBA, the Gaelic Media Service.

Orkney
Orkney is a hive of creative industry, with several internationally renowned jewellery manufacturers such as Ortak, Sheila Fleet, Kirsteen Stewart and Hume Sweet Hume, in addition to the many other professional craftspeople at work in the islands.

Orkney is host to a number of annual festivals and events, such as The Orkney Folk Festival and St Magnus International Festival, which has grown over the past 40 years into one of Britain's most adventurous and highly-regarded arts events.

Recent years has seen the completion of several significant capital projects. Orkney has a brand new theatre in Kirkwall, attached to the newly built Kirkwall Grammar School, Stromness Library opened in April 2015, while future projects include The Orkney Creative Hub, led by the Orkney Crafts Association.

Eden Court Theatre, Inverness

Next

5

Key challenges, priorities and Action Plan

For the Creative Industries to continue to strengthen there are challenges for industry and the education and skills system that arise from this work.

In summary, these include the need to:

- promote creativity as a core component of learning at statutory and tertiary levels of education, as being central to individual, social, cultural and business development
- support young people to build a portfolio of core, technical, digital, creative and career management skills for those aspiring to work in the creative industries
- support learners to build greater awareness, "real-world" insight and experience of how creative skills are used in new, innovative ways across the economy
- diversify access and take-up of learning and employment opportunities by people currently under-represented in the Scottish creative industries workforce
- deliver industry relevant work-based learning in partnership with schools, colleges and universities
- encourage integration of business development, entrepreneurship and innovation skills within Scottish creative education and vocational training
- develop and support creative leadership, critical confidence and management skills to drive and secure sustainability, resilience and growth across Scotland's creative industries
- engage industry and the skills system in developing and co-investing in workforce development
- develop a coherent business investment and support system through strategic partnership working in support of the Skills Investment Plan.

As described earlier, the above factors sit within a context of a high micro and small business base that is spread across Scotland. The challenge for industry and the education and skills system in working together to support the future growth of the sector requires a multi-faceted and flexible approach, aligned to a common strategy. The following action plan sets out the strategy and framework for such an approach.

The action plan takes each of the themes and outlines areas of work that SDS will take forward with industry and public sector partners. This aims to present strategic commitments for action by SDS, industry and partners, recognising the industry bodies and others will have their own detailed delivery plans in support of the sector.

Figure 5.1: Skills Investment Plan vision

Developing and retaining a talent pool to support the growth of the Scottish creative sector.

Theme 1: Developing Industry Readiness & Progression	Theme 2: Addressing the Creative Digital Agenda	Theme 3: Developing Leadership & Business Skills	Theme 4: New Approaches to Delivery
• Raise Awareness of The World of Work • Strengthen Entry Level Skills via Work-based Learning • Diversify Talent Pipeline • Develop Pathways to Graduate Employment	• Sustain Creative and Cultural Provision • Embed the Business of Creative Digital Practice • Increase Number & Mode of Multi-Disciplinary Courses • Deliver Industry CPD for Educators	• Map & Uplift Business, Enterprise & Innovation Training & Education • Develop Business Skills for Practitioners • Support Leadership Development & Succession Planning • Skills for Domestic & International Business Growth	• Deliver Specialist Provision in Priority Areas • Improve Scotland's CI LMI Collection & Reporting • Improve Access & Availability of Modern Apprenticeships • Enhance Scotland's Fiscal Measures for Creative Skills Development

Action Plan

Theme 1: Developing Industry Readiness & Progression

Action	Description	Partners	Expected outcome	Milestones
Raise awareness of the world of work	• Refresh My World of Work Creative Industries content and establish Scottish -wide programme of creative and cultural careers events • Develop creativity and work skills in support of Scotland's Creative Learning Plan • Promote skills projects, successes and challenges across Scottish formal and informal education in Creative Industries • Develop employability skills via Scotland's youth arts hubs & agencies in support of National Youth Arts Strategy	Lead: SDS, Education Scotland, Creative Scotland, Employers Supported by: Scottish Funding Council, Chambers of Commerce, COSLA, Trade Associations & Unions	Increased awareness of skills demands and career opportunities in the sector across a broader cohort Regular strategic review and monitoring of impacts across statutory and tertiary education Increase in volume of applications for Creative Employability Fund and MA places and related programmes at FE and HE 32 LA Area employer/ school partnerships established	Q4 2015 and ongoing Q1 2016
Strengthen entry level skills through delivery of work-based Learning	• Identify, develop and promote good practice in work based learning across FE and HE • Establish new Work Based Learning Hubs across Scotland • Develop new employability activities and measures in key sector growth groups: Visual Arts, Performance, Audio-Visual, Heritage, Books & Press, Digital Industries & Creative Education • Work with key sector networks to promote successful progression strategies to work and business start-up • Review access and impacts of Creative Internships, Traineeships & Apprenticeships	Lead: SFC, SDS, Colleges Scotland, Universities Scotland & Employers Supported by: Creative Scotland, Highlands & Islands Enterprise, Sector Skills Councils	Improved capacity to offer quality work based learning across FE and HE Demonstrate positive change and improvement by volume of and access to opportunities Transition from Learning to Work smoother and successful models secured and expanded in future years	Commence Q3 2015 and ongoing Baselines established by Q4 2015 and reported on a six month basis Initiate Q4 2015 and complete June 2016 Review Q3/4 2015 and agree development steps

Action	Description	Partners	Expected outcome	Milestones
Diversify talent pipeline	• Establish diversity data baselines on national, regional and subsectoral basis, on engagement and employment • Engage with under-represented groups across Creative Industries in service design of existing and new CIAG & skills interventions • Establish "Young Creative" programme to mainstream and promote diversity and inclusivity, identify ambassadors and celebrate quality models: businesses, programmes & individuals	Lead: SDS, Creative Scotland & Employers Supported by: SFC, Education Scotland, Creative Scotland, Colleges Scotland, Universities Scotland, HIE & SE	Greater diversity in creative industries learner population	Q4 2015 & ongoing
Support the development of pathways to graduate employment	• Promote employment opportunities, career management skills and networking for creative graduates through 'Young Creative Pro' programme	Lead: Employers, SFC, SDS Supported by ES, NUS, CDN, Creative Scotland, Colleges Scotland, Universities Scotland, SE & HIE, Sector Skills Councils	Reduce creative graduate unemployment rates	

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Theme 2: Addressing the Creative Digital Agenda

Action	Description	Partners	Expected outcome	Milestones
Sustain creative and cultural provision	• Review programme availability and places across creative, cultural and craft provision at FE & HE levels • Review issues of access to computing science versus computer arts provision and promote awareness of skills demands in creative disciplines to all • Establish progression and qualification pathways, highlighting use of digital, business, innovation and creativity skills, to work and business start-up	Lead: Scottish Funding Council, Education Scotland, SDS, employers Supported by: Creative Scotland, Chambers of Commerce, COSLA, Trade Associations and Unions	Secure foundation level training in performing, visual and crafts disciplines Greater awareness of career possibilities, outcomes and benefits	Q4 2015 and ongoing Q1 2016
Embed the business of creative digital practice	• Identify good creative digital practice in FE & HE, develop case studies • Develop learning resources and experiences to develop, distribute and exploit the business benefits of digital practice • Establish national and regional educational & creative business/ innovation real-time challenges for learners	Lead: Employers, Scottish Funding Council, colleges, universities, SDS Supported by: Education Scotland, Creative Scotland	Identify and promote innovative creative digital practice in FE & HE Develop learning resources and experiences to support engagement with the business of digital and creative practice in a digital economy Establish national and regional educational & creative business innovation / real – time challenges for learners	Q4 2015 Q3 2015 and ongoing Q4 2015 and ongoing
Increase number & mode of multi-disciplinary courses	• Encourage development of multi-disciplinary, creative, digital and business skills provision for employers and young people • Encourage development of creative management provision for industry take-up, promoting in-demand creative digital roles • Increase part-time and scholarship/ fellowship opportunities and promote to industry	Lead: Employers, Scottish Funding Council & SDS Supported by: SE, HIE & Creative Scotland, Business Gateway and Sector Skills Councils	Develop cross-departmental provision and real-time projects with industry Establish new talent development pipelines to support experienced professionals, indie sector, women, graduates, etc. Support and cross-promote FE/HE to industry	Q4 2015
Deliver industry CPD for educators	• Promote national and regional CPD and knowledge exchange opportunities for educators • Develop opportunities in Schools, FE & HE to cascade business start-up & planning in creative disciplines for educators	Lead: SFC, Education Scotland & SDS Supported by: CDN, Business Gateway, SE & HIE	Define, build and increase up-skilling & development opportunities across CI sub-sectors Equip educators with creative business support skills	Q3 2015 and ongoing

Theme 3: Developing Leadership & Business Skills

Action	Description	Partners	Expected outcome	Milestones
Map & Uplift Business, Enterprise & Innovation Training & Education	• Identify and map current practice in FE & HE institutions, public national enterprise & support agencies • Promote good practice and support integration and blending of business & innovation within existing provision • Initiate programme review and development by institutions directly and support through ongoing SFC Outcome Agreement review process in 2016/17 • Explore industry support for innovation developments	Lead: Employers, SFC & SDS Supported by: Education Scotland, Creative Scotland, Scottish Enterprise & Highlands & Islands Enterprise, Business Gateway	Improved startup rates and stronger resilience of creative businesses in early years Greater and ongoing access to specialised support and targeted financing by creative businesses	Q4 2015 and ongoing
Develop Business Skills for Practitioners	• Support executive level training in business skills such as marketing, finance and funding, accounting, IP & Legal, readiness for investment, etc. • Establish, develop and evaluate a cohort of content creators, developers, producers, distributors for business growth and resilience	Lead: Employers, SDS, Creative Scotland, SE & HIE Supported by: SFC, A+BS, Sector Skills Councils	Next generation of creative and innovative producers identified and supported	Q3 2015 & ongoing

Action	Description	Partners	Expected outcome	Milestones
Support Leadership Development & Succession Planning	• Establish development programme and support for creative leaders & producers in digital, creative and performing arts • Develop conversion training for established Professionals to transfer to Creative Businesses and environments • Working with Cultural & Creative Boards, Departments and Teams on Leadership, Growth and Succession Planning	Lead: Employers, SDS, Creative Scotland Supported by SFC, SE & HIE, Sector Skills Councils	Establish, develop and evaluate a cohort of Creative Business Leaders Support development of business skills and wider capacity building of cultural organisations	Q2 2015 and ongoing Q2 2016 and ongoing Q3/4 2015
Skills for Domestic & International Business Growth	• Establish an integrated programme of business support for creative business seeking to grow dynamically in domestic and international markets, e.g. e-commerce, marketing mix, contracts, IP and law, manufacturing, international co-production, licensing and agents, distribution channels • Deliver SDS Skills for Growth support delivered across Creative Digital and cultural businesses	Employers, SDS, Creative Scotland, Scottish Funding Council, Scottish Enterprise & Highlands & Islands Enterprise, SDI	Skills and knowledge to support business growth nationally and internationally Greater opportunity for skills training, placement and work opportunity incompany for young people	Q4 2015 and ongoing

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Theme 4: New Approaches to Delivery

Action	Description	Partners	Expected outcome	Milestones
Deliver Specialist Provision in Priority Areas	• Review demand for specialised craft, technical and creative, low volume training and work with the industry to respond to these needs • Engage industry in developing and delivering co-investment strategies for workforce development	Lead: Employers, SDS & Creative Scotland, SE & HIE, Sector Skills Councils	Responsive delivery of high quality, resident skills to meet new demand	Q4 2015 and ongoing
Improve Scotland's CI LMI collection & reporting	• Establish effective and sustainable means of gathering reliable industry workforce & skills data in Scotland	Lead: SG Supported by: SDS, SE & HIE	Credible Sector LMI produced effectively and regularly	Q1 2016 and ongoing
Improve Access & Availability of Modern Apprenticeships & Structured Traineeships	• Review delivery of Creative MAs and establish parameters for growth and expansion, establish specific pilots in line with growth where needed, establish pathway linkages to foundation & advanced apprenticeships, where supported by industry	Lead: SG, SDS & Employers Supported by: ES, LAs, DWP, CS & SSCs	Review and refit MAs with industry for adoption Establish linkages between structured traineeships & work-based learning via Employability Fund, Certificate of Work Readiness and MAs Increase take-up and support progression from schools to work and earn & learn in support of diversifying workforces	Q2 2015 and ongoing
Enhance Scotland's Fiscal Measures for Creative Skills Development	• Review opportunities afforded by Smith Commission to support introduction of new fiscal measures in Scotland to support delivery of this SIP • Advocate and secure enhanced spend of relevant UK Skills Investment Funds in the actions of this SIP in Scotland	Lead: SG Supported by: SCIP & Industry	Develop support for new methods and means to accrue and allocate new creative skills funds via Scottish fiscal amendments	From Q2 2015 and ongoing

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The co-ordination and delivery of the SIP will be led by the SDS Creative Industries Sector Manager with the support of the Creative Industries Skills Forum.

Specifically, SDS will facilitate the following:

- coordinating the activities of partners in support of the action plan and reporting on progress to the skills forum
- developing a performance framework including indicators of success to monitor progress of individual actions, as well as the overall performance of the SIP. It will also be important to consider how progress can be reflected within the outcome agreements developed by the colleges and universities
- where appropriate, facilitating discussions across partners and industry to secure resources to support the implementation of activities set out in the action plan
- coordinating the delivery of specific projects through working in partnership with industry and public sector colleagues and to ensure they are delivered in response to the plan priorities.

It is proposed that a formal review of the SIP and action plan will be undertaken 3 years after the launch of the document and a statement of progress will be produced by SDS on behalf of the skills forum.

Appendices

Appendix 1: Creative Industry Employment in Scotland LAs

	2010	2011	2013	Change	%
Aberdeen City	4,700	5,000	4,000	-700	-15%
Aberdeenshire	1,700	1,700	1,500	-200	-12%
Angus	900	800	800	-100	-11%
Argyll & Bute	600	600	500	-100	-17%
Clackmannanshire	400	300	300	-100	-25%
Dumfries & Galloway	1,000	1,000	800	-200	-20%
Dundee City	3,800	3,300	2,700	-1,100	-29%
East Ayrshire	700	800	700	0	0%
East Dunbartonshire	1,300	1,200	1,100	-200	-15%
East Lothian	800	900	800	0	0%
East Renfrewshire	700	500	400	-300	-43%
Edinburgh, City of	13,900	13,000	10,900	-3,000	-22%
Eilean Siar	300	300	300	0	0%
Falkirk	900	900	700	-200	-22%
Fife	3,800	3,600	3,400	-400	-11%
Glasgow City	18,600	17,400	16,900	-1,700	-9%
Highland	2,600	2,700	2,400	-200	-8%
Inverclyde	600	500	400	-200	-33%
Midlothian	1,000	900	800	-200	-20%
Moray	600	600	500	-100	-17%
North Ayrshire	800	1,000	700	-100	-13%
North Lanarkshire	2,800	2,700	2,200	-600	-21%
Orkney Islands	400	300	300	-100	-25%
Perth & Kinross	1,400	1,500	1,200	-200	-14%
Renfrewshire	2,200	2,200	2,000	-200	-9%
Scottish Borders	1,200	1,200	1,000	-200	-17%
Shetland Islands	200	300	200	0	0%
South Ayrshire	800	800	700	-100	-13%
South Lanarkshire	2,800	2,300	2,100	-700	-25%
Stirling	1,100	1,000	800	-300	-27%
West Dunbartonshire	600	500	500	-100	-17%
West Lothian	2,900	2,200	2,200	-700	-24%
Total	**76,100**	**72,000**	**63,800**	**-12,300**	**-16%**

Source: Scottish Government Growth Sector statistics, September 2013

Appendix 2: Creative Industries registered enterprises [No's] 2008-2014

Subjects	2008	2009	2010	2011	2012	2013	2014	Change	%
Zero Emp	5,780	6,035	6,155	6,605	7,030	7,565	7,910	2,130	37%
1-49 Emp	4,215	4,370	4,580	4,610	5,015	5,045	5,620	1,405	33%
50-249 Emp	170	185	185	180	185	195	190	20	12%
250+ Emp	115	115	105	95	90	95	105	-10	-9%
Total	**10,275**	**10,705**	**11,025**	**11,495**	**12,325**	**12,900**	**13,825**	**3,550**	**35%**

Source: Government Economic Strategy Growth Sector Statistics, January 2015

Appendix 3: Creative Industries registered enterprises [No's] 2008-2014

Sub-sector	2009	2010	2011	2012	2013	2014	Change	%
Software/Elec	3,830	3,905	4,365	4,880	5,195	5,725	1,895	49%
Design	1,245	1,355	1,425	1,580	1,810	2,080	835	67%
Writing and Publishing	1,305	1,270	1,190	1,190	1,145	1,130	-175	-13%
Architecture	945	1,015	1,035	1,100	1,120	1,145	200	21%
Advertising	550	575	615	655	650	665	115	21%
Visual Art	525	515	510	505	490	505	-20	-4%
Performing Arts	395	445	455	470	495	510	115	29%
Crafts and Antiques	400	385	365	380	355	365	-35	-9%
Photography	400	390	375	355	325	350	-50	-13%
Fashion and Textiles	320	330	325	340	345	350	30	9%
Radio and TV	310	325	330	330	355	375	65	21%
Film and video	255	275	260	250	270	285	30	12%
Music	140	140	135	145	155	150	10	7%
Cultural Education	50	55	50	60	75	75	25	50%
Computer Games	10	15	35	50	75	90	80	800%
Libraries and Archives	25	25	25	25	25	25	0	0%
	10,700	**11,015**	**11,490**	**12,325**	**12,885**	**13,825**	**3,125**	**29%**

Source: Government Economic Strategy Growth Sector Statistics, January 2015

Appendix 4: Creative Industries employment 2009-2013

Subjects	2009	2010	2011	2012	2013	Change	%
Software/Elec Publishing	20,200	18,700	17,000	19,000	22,200	2,000	10%
Writing and Publishing	14,400	15,300	12,300	10,400	10,500	-3,900	-27%
Architecture	7,600	6,200	5,600	5,200	5,900	-1,700	-22%
Design	4,800	4,500	4,200	4,800	5,700	900	19%
Libraries and Archives	4,600	4,500	4,000	4,300	3,700	-900	-20%
Performing Arts	5,000	4,800	4,600	4,000	4,800	-200	4%
Advertising	4,300	3,500	3,200	3,900	3,000	-1,300	-30%
Radio and TV	3,300	3,600	3,000	3,200	2,700	-600	-18%
Crafts and Antiques	2,300	1,900	2,100	2,600	1,800	-500	-22%
Film and Video	2,900	3,300	2,300	2,600	2,300	-600	-21%
Fashion and Textiles	3,300	2,500	2,700	2,400	2,500	-800	-24%
Visual Art	1,300	1,200	1,100	900	1,200	-100	-8%
Photography	900	700	500	600	600	-300	-33%
Computer Games	200	200	500	600	1,000	800	400%
Music	300	500	300	300	300	0	0%
Cultural Education	500	500	600	200	300	-200	-40%
	75,900	**71,900**	**64,000**	**65,000**	**68,500**	**-7,400**	**-10%**

Source: Strategy Growth Sector Statistics, January 2015

Appendix 5: Employment numbers by SOC (2010)

	'000s	Full-time	Parttime	Total	Fulltime	Parttime	Total
1134 Advertising and public relations directors	18	13	*	15	*	*	*
1136 Information technology and telecommunications directors	62	51	*	53	6	*	9
2133 IT specialist managers	172	164	5	169	*	*	*
2134 IT project and programme managers	73	68	*	70	*	*	*
2135 IT business analysts, architects and systems designers	108	97	*	99	6	*	8
2136 Programmers and software development professionals	253	215	6	222	27	5	32
2137 Web design and development professionals	63	32	*	36	20	6	26
2139 Information technology and telecommunications professionals n.e.c.[4]	170	120	6	126	36	8	43
2431 Architects	58	32	6	37	16	*	20
2435 Chartered architectural technologists	*	*	*	*	*	*	*
2451 Librarians	31	20	11	31	*	*	*
2452 Archivists and curators	12	7	*	11	*	*	*
2471 Journalists, newspaper and periodical editors	70	37	5	43	17	10	27
2472 Public relations professionals	37	22	9	31	*	*	5
2473 Advertising accounts managers and creative directors	30	25	*	27	*	*	*
3121 Architectural and town planning technicians	16	14	*	15	*	*	*
3122 Draughtspersons	35	30	*	32	*	*	*
3411 Artists	52	5	*	7	31	12	43

	'000s	Full-time	Part-time	Total	Fulltime	Parttime	Total
3412 Authors, writers and translators	70	17	7	24	16	26	42
3413 Actors, entertainers and presenters	38	5	5	9	13	15	28
3414 Dancers and choreographers	12	*	*	*	*	6	10
3415 Musicians	38	6	*	8	19	11	29
3416 Arts officers, producers and directors	67	35	*	38	24	*	27
3417 Photographers, audio-visual and broadcasting equipment operators	76	29	*	32	34	9	43
3421 Graphic designers	86	54	6	60	20	*	25
3422 Product, clothing and related designers	56	24	*	28	19	9	27
3543 Marketing associate professionals	168	102	43	145	12	9	21
4135 Library clerks and assistants	28	9	18	28	*	*	*
5411 Weavers and knitters	*	*	*	*	*	*	*
5414 Tailors and dressmakers	9	*	*	*	*	*	7
5419 Textiles, garments and related trades n.e.c.[4]	8	*	*	5	*	*	*
5421 Pre-press technicians	*	*	*	*	*	*	*
5422 Printers	37	32	*	32	*	*	*
5423 Print finishing and binding workers	17	12	*	15	*	*	*
5441 Glass and ceramics makers, decorators and finishers	12	7	*	7	*	*	5
5442 Furniture makers and other craft woodworkers	37	20	*	22	12	*	15
Total	**2,018,143**	**1,305,155**	**127,110**	**1,477,936**	**327,255**	**125,354**	**493,044**

Source: UK SOC (2010) data 2013 Office of National Statistics

Appendix 6: Change in Creative Occupations

000s	2011	2013	Change	% Change
1134 Advertising and public relations directors	26	18	-8	-31%
1136 Information technology and telecommunications directors	54	62	8	15%
2133 IT specialist managers	174	172	-2	-1%
2134 IT project and programme managers	58	73	15	27%
2135 IT business analysts, architects and systems designers	90	108	18	20%
2136 Programmers and software development professionals	224	253	29	13%
2137 Web design and development professionals	63	63	-1	-1%
2139 Information technology and telecommunications professionals n.e.c.4	162	170	9	5%
2431 Architects	45	58	13	28%
2435 Chartered architectural technologists	*	*		
2451 Librarians	25	31	6	23%
2452 Archivists and curators	14	12	-2	-11%
2471 Journalists, newspaper and periodical editors	62	70	8	13%
2472 Public relations professionals	39	37	-2	-5%
2473 Advertising accounts managers and creative directors	19	30	11	61%
3121 Architectural and town planning technicians	17	16	-1	-5%
3122 Draughtspersons	36	35	-1	-3%
3411 Artists	41	52	10	25%
3412 Authors, writers and translators	75	70	-6	-7%
3413 Actors, entertainers and presenters	38	38	0	0%
3414 Dancers and choreographers	18	12	-7	-37%
3415 Musicians	35	38	3	10%
3416 Arts officers, producers and directors	69	67	-3	-4%
3417 Photographers, audio-visual and broadcasting equipment operators	66	76	9	14%
3421 Graphic designers	58	86	27	47%
3422 Product, clothing and related designers	52	56	4	7%
3543 Marketing associate professionals	145	168	23	16%
4135 Library clerks and assistants	38	28	-10	-26%
5411 Weavers and knitters	*	*		
5414 Tailors and dressmakers	14	9	-5	-37%
5419 Textiles, garments and related trades n.e.c.4	*	8		
5421 Pre-press technicians	*	*		
5422 Printers	46	37	-9	-20%
5423 Print finishing and binding workers	21	17	-4	-19%
5441 Glass and ceramics makers, decorators and finishers	*	12		
5442 Furniture makers and other craft woodworkers	45	37	-8	-17%
Total	**1,870,373**	**2,018,143**	**148**	**8%**

Source: UK SOC (2010) data 2013 Office of National Statistics

Acknowledgement
Skills Development Scotland would like to thank all the businesses and partner organisations who took the time to support the development of the SIP by taking part in workshops, focus groups and consultations. We would specifically like to thank members of the Creative Industries Skills Forum.

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