

South Yorkshire Mayoral Combined Authority

Cultural and Creative Industries

Data Research and Mapping



THE FIFTH SECTOR

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Executive Summary

Background

The Fifth Sector began work on data research and mapping of the creative sectors in South Yorkshire in December 2021.

The work had two main objectives:

1. To provide evidence for policy by:

- ➔ Addressing gaps in evidence.
- ➔ Taking an asset-based approach (i.e., focussing on what is here, and the opportunities it presents for further investment and growth, not what isn't here).
- ➔ Providing a robust evidence base that would both, "Support, develop and advocate for this sector in the future" and "Inform the development of a wider South Yorkshire Arts, Culture and Heritage strategy."

2. To identify opportunities for new investment, including:

- ➔ Arts Council England and DCMS priorities
- ➔ Other public sector "levelling up" funds
- ➔ Increased employer investment in training and skills
- ➔ Business start up, scale up and inward investment

Our research took in both **measurement** (using a range of source to map the scale, significance and distribution of South Yorkshire's cultural and creative industries and its creative workforce, and the provision of creative skills training and education in and around South Yorkshire) and **engagement**, including with local creative and digital businesses, regional and national sector organisations, education and training providers and round tables with each of the region's four local authorities.

Findings – scale and significance of the sector

Our research demonstrated that South Yorkshire's creative industries comprise over 4,000 companies and a workforce of over 31,000 people. Both these figures are larger than suggested by national statistics (2,895 businesses and 13,500 employees, respectively).

The region demonstrates clustering of some creative sectors, including Architecture, Crafts, Design and Publishing, mostly centred on Sheffield; but overall, it has a smaller creative and digital business base than other core cities and city regions.

Whilst the structure of the sector – which reflects the high levels of freelance working and microenterprises typical of creative industries everywhere – makes it hard to provide exact measures of output, we suggest that culture and creative industries are worth **up to £2 billion in GVA**.

Opportunities

Our findings highlighted both sustained growth in the sector over the last decade and a much higher proportion of creative content businesses than identified in national figures. This combination of content and digital capability means that South Yorkshire could be well positioned to exploit the growth in demand for both high end television and short form content of all kinds.

There are some time-limited opportunities which need to be seized now, and in which SYMCA needs to show leadership in supporting and coordinating the activities of local authorities, the education sector, private sector business support and training providers and pan-regional and national agencies. These include:

- ➔ Identification of Barnsley, Doncaster and Rotherham as eligible areas for 'Levelling Up for Culture' funding.
- ➔ Arts Council England's nomination of Barnsley and Rotherham as 'Priority Places' within its ten-year Let's Create strategy.
- ➔ Building on the distinctiveness and excellence of local initiatives, including Barnsley DMC and the Children's Capital of Culture in Rotherham, to take a leading role in the NP11's efforts to argue for greater devolution of funding for culture from Whitehall.

However, if it is to do that it needs to:

- ➔ Act quickly to redress the shortfalls in investment in its creative sector over the last decade, both in absolute terms and relative to competitor cities and city regions across the North.
- ➔ Ensure that city region marketing promotes well-established creative conferences and marketplaces, such as the Children's Media Festival and Sheffield DocFest, alongside the work of arts and cultural institutions.
- ➔ Convene regional policy forums both for overall coordination of creative sector investment, to promote more joined up provision of creative skills and marketing of creative skills pathways, and to ensure that recommendations of other reports, such as the South Yorkshire Regional Music Report, are understood and followed through by educational institutions, national agencies and the public sector, acting in concert.
- ➔ Interventions need to support the principle of 'doing things weirdly' to ensure that delivery reflects the priorities and operating models of creative businesses themselves. This means gearing business support and investment around what works – established and successful programmes delivered in both public and private sectors – and taking risks in advance of private sector investors to show confidence in the sector.
- ➔ Provide financial support to sector organisations, including Screen Yorkshire, to ensure that they can continue to deliver services and investment support to residents and businesses in South Yorkshire.
- ➔ Convene, hold space, broker and facilitate forums to address equality, diversity and inclusion collectively and in a way that is reflective of the people of South Yorkshire as it is now and how it will be. SYMCA has a critical role in ensuring that EDI is an approach not just an outcome – and its leadership will mean it and the creative sector can flex and adapt as both local and national societal environments change.

1. Creative employment and workforce data

The “official” count of employment in the cultural and creative industries (CCI) is taken from the Office of National Statistics’ annual Business Register and Employment Survey (BRES)¹. The latest data available are those for the year to April 2020 –immediately prior to the first ‘lockdown’. They show total sector employment of 13,500, with IT, software and computer services as the largest sector, with 7,845 employees (58%), followed by Architecture (1,355 jobs, 10%) and Publishing (955 jobs, 7%).

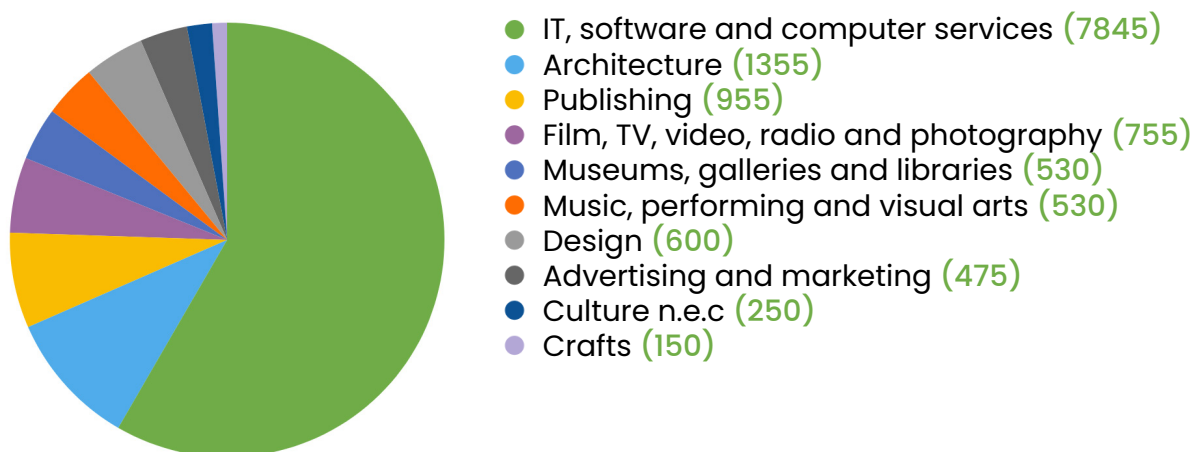


Figure 1: SYMCA Cultural & Creative Industries employment
The Fifth Sector 2022.

Cluster analysis – using a ‘Location Quotient’ or LQ based on the concentration of employment within creative industries compared with a national average – suggests that South Yorkshire lags both the national average and other ‘M10’ core cities in most sectors, with clear evidence of clustering (an LQ of 1 or above) in only Architecture, Publishing and Crafts (narrowly defined as the manufacture of jewellery) in Sheffield. However, the concentration of creative employment in London and the South East is such that an LQ of 0.80 or above indicates clustering, which would bring Design and designer fashion into the frame.

DCMS subsector	Barnsley	Doncaster	Rotherham	Sheffield	SYMCA	Great Britain
Advertising & marketing	0.08	0.05	0.08	0.24	0.15	1.00
Architecture	0.14	0.28	0.17	1.69	0.89	1.00
Crafts	0.00	0.33	0.40	4.35	2.13	1.00
Design	0.48	0.32	0.34	0.87	0.60	1.00
Film, TV, video, radio & photography	0.19	0.12	0.18	0.34	0.25	1.00
IT, software & computer services	0.20	0.10	0.50	0.48	0.36	1.00
Publishing	0.34	0.03	0.37	1.12	0.65	1.00
Museums, galleries & libraries	0.00	0.30	0.50	0.43	0.39	1.00
Music, performing and visual arts	0.31	0.29	0.09	0.56	0.38	1.00
Culture n.e.c	0.13	0.33	0.20	0.92	0.55	1.00
All CCI	0.27	0.20	0.66	0.72	0.52	1.00

Table 1: LQs for creative industries employment in SYMCA area
The Fifth Sector 2022.

South Yorkshire LQ's compared to national figure

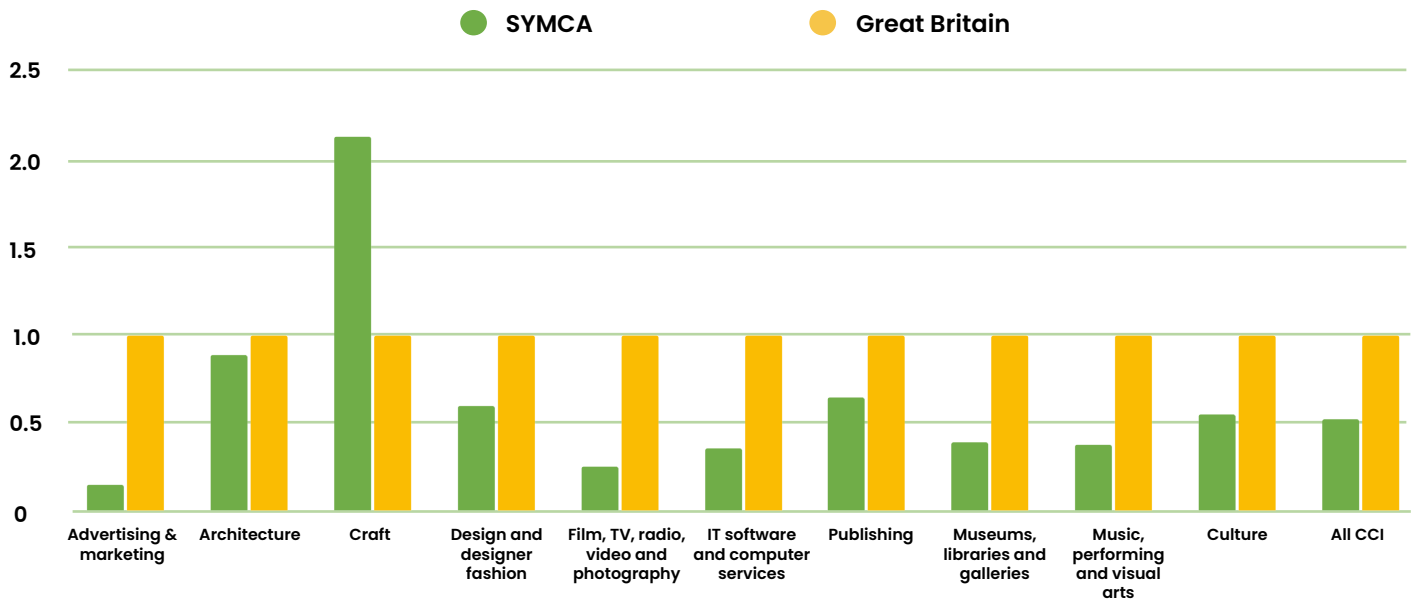


Figure 2: SYMCA region LQ's compared to figures for Great Britain
The Fifth Sector 2022.

Addressing gaps in the official record

It is widely acknowledged, even within the Department for Digital, Creative, Media & Sport (DCMS), that the methodology for collecting BRES data tends to exclude both freelance workers and micro-enterprises with earnings below the VAT threshold, which together make up a significant proportion of creative employment. To address these gaps, we used a method developed over the last five years based on LinkedIn data. LinkedIn has 29 million UK members, out of a total employed workforce of 33 million; and it uses a set of industry codes much more closely aligned to industry definitions.

DCMS sub-sector	DCMS SIC	LinkedIn Industry Code
Advertising & marketing	7021: Public relations and communication activities 7311: Advertising agencies 7312: Media representation	Public Relations and Communications Marketing and Advertising Public Relations and Communications
Architecture	7111: Architectural activities	Architecture and Planning
Crafts	3212: Manufacture of jewellery and related articles	Luxury Goods and Jewellery
Design	7410: Specialised design activities	Design, Graphic Design, Apparel and Fashion
Film, TV, video, radio & photography	6010: Radio broadcasting 6020: Television programming and broadcasting activities 5911: Motion picture, video and television programme production activities 5912: Motion picture, video and television programme post-production activities 5913: Motion picture, video and television programme distribution activities 5914: Motion picture projection activities 5920: Sound recording and music publishing activities 7420: Photographic activities	Broadcast Media Broadcast Media Motion Pictures and Film, Broadcast Media Motion Pictures and Film, Broadcast Media Motion Pictures and Film, Broadcast Media Motion Pictures and Film, Broadcast Media Music Photography

DCMS sub-sector	DCMS SIC	LinkedIn Industry Code
IT, software & computer services	5821: Publishing of computer games 5829: Other software publishing 62011: Ready-made interactive leisure and entertainment software development 62012: Business and domestic software development 6202: Computer consultancy activities	Computer Games Computer Software, Computer & Network Security Computer Software, Computer & Network Security Computer Software, Computer & Network Security Computer Software, Computer & Network Security
Publishing	5811: Book publishing 5812: Publishing of directories and mailing lists 5813: Publishing of newspapers 5814: Publishing of journals and periodicals 5819: Other publishing activities 7430: Translation and interpretation activities	Publishing Publishing Publishing Publishing Publishing Translation and Localization
Museums, galleries & libraries	9101: Library and archive activities 9102: Museum activities 8552: Cultural education	Libraries Museums and Institutions No equivalent industry in LinkedIn
Music, performing and visual arts	9001: Performing arts 9002: Support activities to performing arts 9003: Artistic creation 9004: Operation of arts facilities	Performing Arts Performing Arts Arts & Crafts, Fine Art Performing Arts
Culture SIC codes (not included in Creative Industries)	1820: Reproduction of recorded music 3220: Manufacture of musical instruments 4763: Retail sale of music and video recordings in specialised stores 9103: Operation of historical sites and building and similar visitor attractions	Music Music Music Museums and Institutions

Table 2: Comparison of DCMS sectors and LinkedIn industry codes
The Fifth Sector/Curator Technologies 2022.

We then group these codes by supply chains which more closely reflect patterns of employment:






 Content	 Experiences	 Originals	 Services	 Software
Film	Festivals	Fine arts/visual arts	Advertising	AI
Television	Events	Crafts/jewellery	Marketing	App development
Radio	Museums	Fashion design	Public relations	CAD
Broadcast media	Libraries		Architecture	Non-entertainment applications of AR/VR
Video	Galleries		Planning	Cyber security
Photography	Live music		Urban design	Internet of Things
Sound recording and recorded music industry	Performing arts		Graphic Design	Modern services – eg. edtech, fintech, healthtech
Video games and mobile games	Theatre		Product design	Software consultancy
Animation	Dance		Design consultancy	
Software publishing	Arts venues			
Immersive content (AR/VR/XR)	Public arts			

Table 3: LinkedIn industry codes by Supply Chain
The Fifth Sector/Curator Technologies 2022.

This analysis indicates a much larger workforce – over 31,000 individuals who identify themselves as being located in South Yorkshire. That would suggest a freelance workforce – including those for whom creative employment forms part of a ‘portfolio’ career, and those looking for work – of around 18,000 people. That proportion – 60% of the total workforce – is consistent with other industry studies, and with the evidence from other parts of the UK where we have carried out a similar analysis. The breakdown of employment by supply chain is shown in Figure 3:

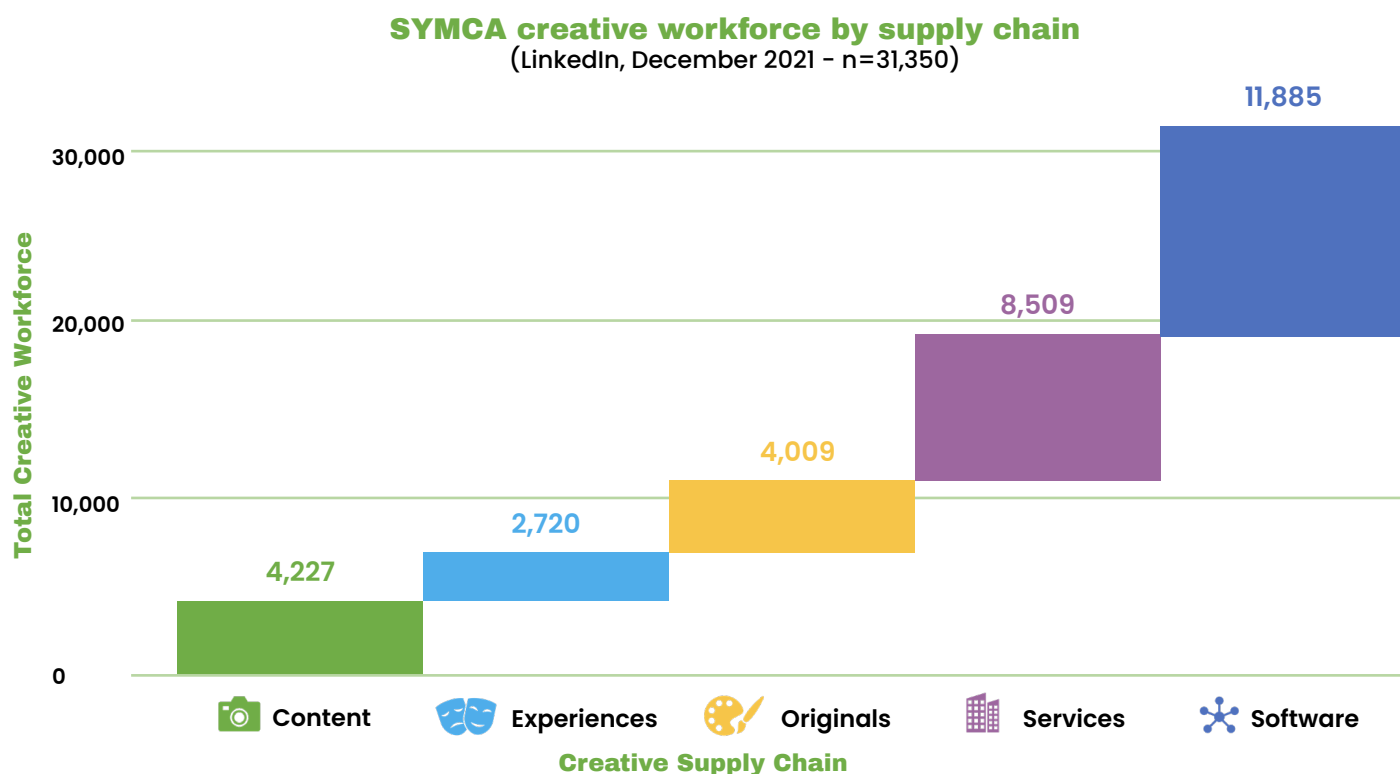


Figure 3: Estimate of SYMCA creative workforce based on analysis of LinkedIn
The Fifth Sector/Curator Technologies 2022.

2. Mapping cultural and creative enterprises in South Yorkshire

Similar considerations about the quality of official data apply to analysis of the stock of creative businesses. We used a combination of data sources to highlight this and to make a robust case that the number of creative enterprises in South Yorkshire is greater than shown in official statistics. Those were:

- ➔ The Inter-Departmental Business Register (IDBR), the government's official business count, extracted from the Nomisweb online portal.
- ➔ Our own analysis of Companies House data.
- ➔ The proprietary FAME database held by the Mayoral Combined Authority.
- ➔ Beauhurst, another proprietary database, which provides up-to-the-minute data about investment and financial performance

We searched the first three of these databases using the SIC codes and sub-sector groupings used by DCMS to define cultural and creative industries.

Beauhurst includes other industry and market data which leads it to include some businesses which we would not typically classify within the cultural and creative sector, so we used this for other kinds of comparative analysis, including long-term trends in business formation and overall business population.

Comparing our analysis of Companies House with the IDBR and FAME data highlights **wide discrepancies in estimates of CCI business population**, as illustrated in Figure 4 below:

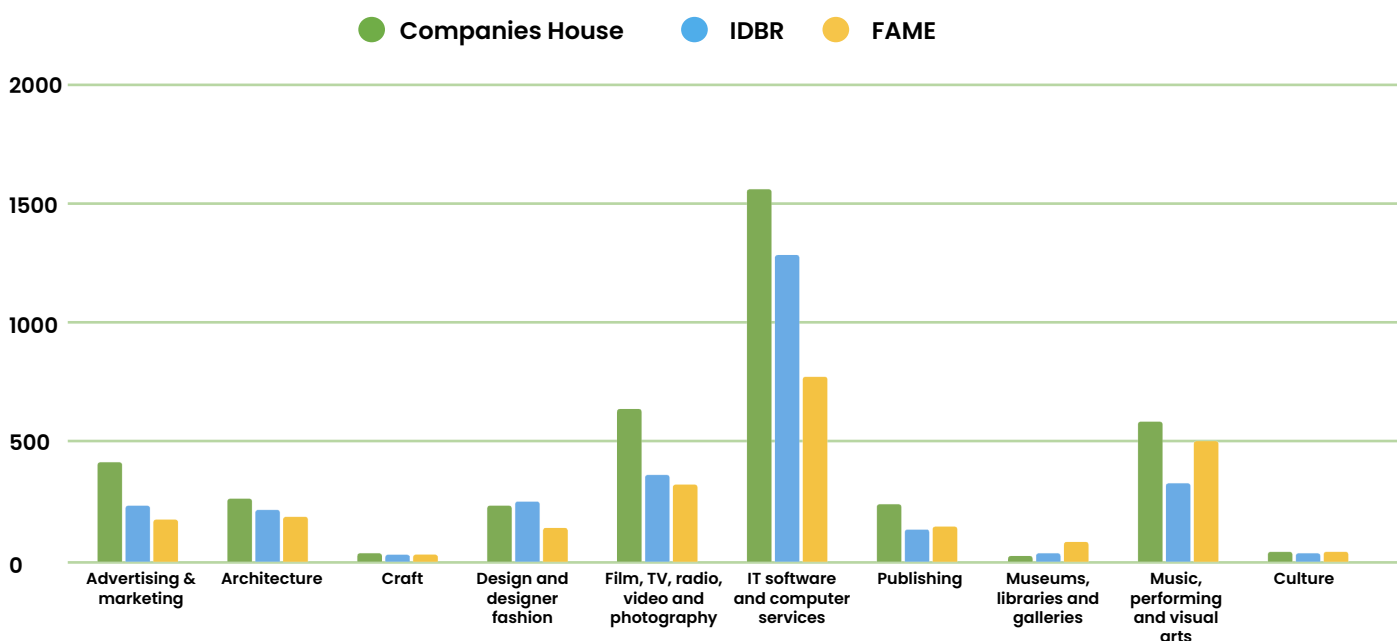


Figure 4: Comparison of Companies House, IDBR and FAME data on creative business counts
The Fifth Sector 2022.

The Companies House data was manually cleansed to extract several hundred 'service companies' for artists, musicians and producers from outside the region and Special Purpose Vehicles (eg, film productions) with registered office addresses at two specialist accountancy firms in Sheffield and Doncaster. We are confident, therefore, that the figures are robust. Analysing these data using the same supply chain definitions applied to the workforce data gives a much clearer indication of the relative strengths of 'Content' businesses (generating original IP in areas such as film, television, music and computer games) and 'Services' firms (in Advertising, Marketing, Architecture and Design), all of which are understated in IDBR and Fame:

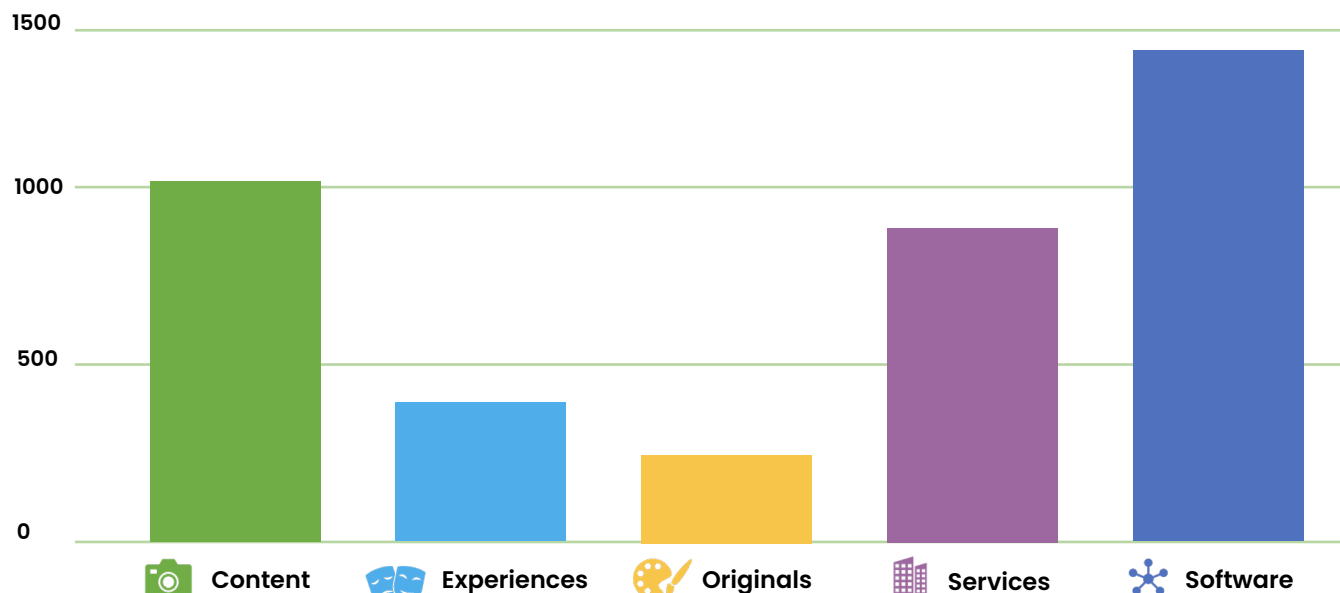


Figure 5: South Yorkshire CCI businesses by supply chain (n=4,025)
The Fifth Sector 2022.

Location of South Yorkshire's creative businesses

Figure 6 shows the location by ward of creative businesses across the region. It shows concentrations of firms in Sheffield city centre and suburbs and in the centres of Barnsley, Doncaster and Rotherham:

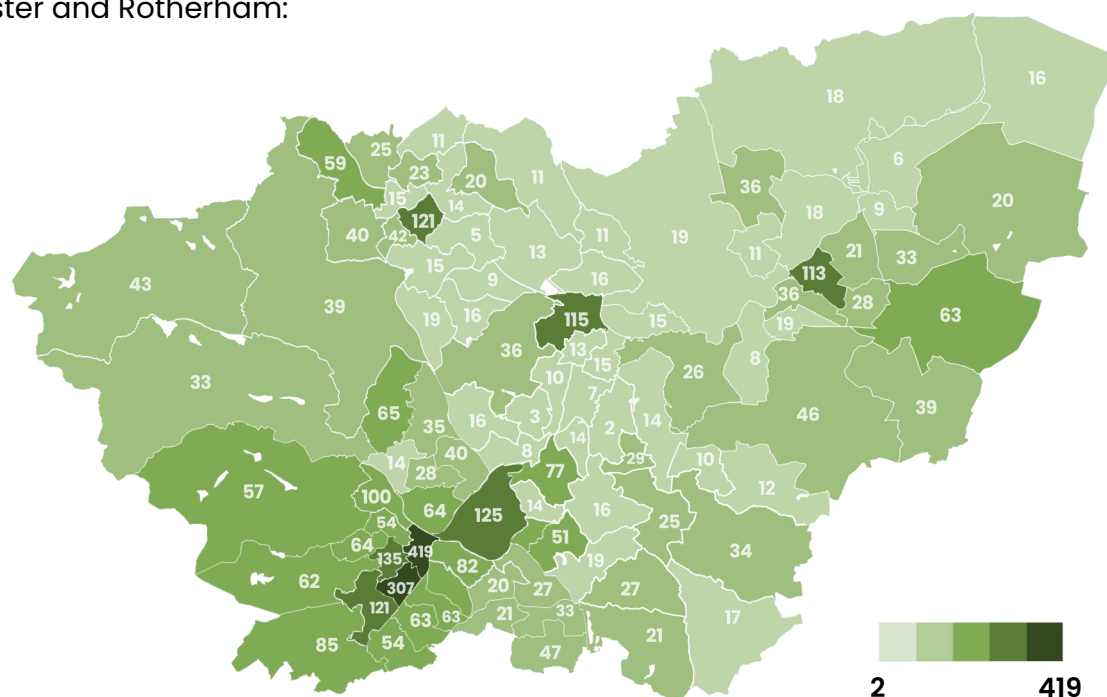


Figure 6: Location of South Yorkshire CCI businesses
The Fifth Sector 2022. [Contains Ordnance Survey data © Crown copyright and data-base right, CC BY-SA 3.0.](#)

Analysis of the same business population by supply chain confirms the size of Sheffield's creative sector, and its higher proportion of Content and Experiences companies. The scale and composition of the sectors is very similar in Barnsley, Doncaster and Rotherham.

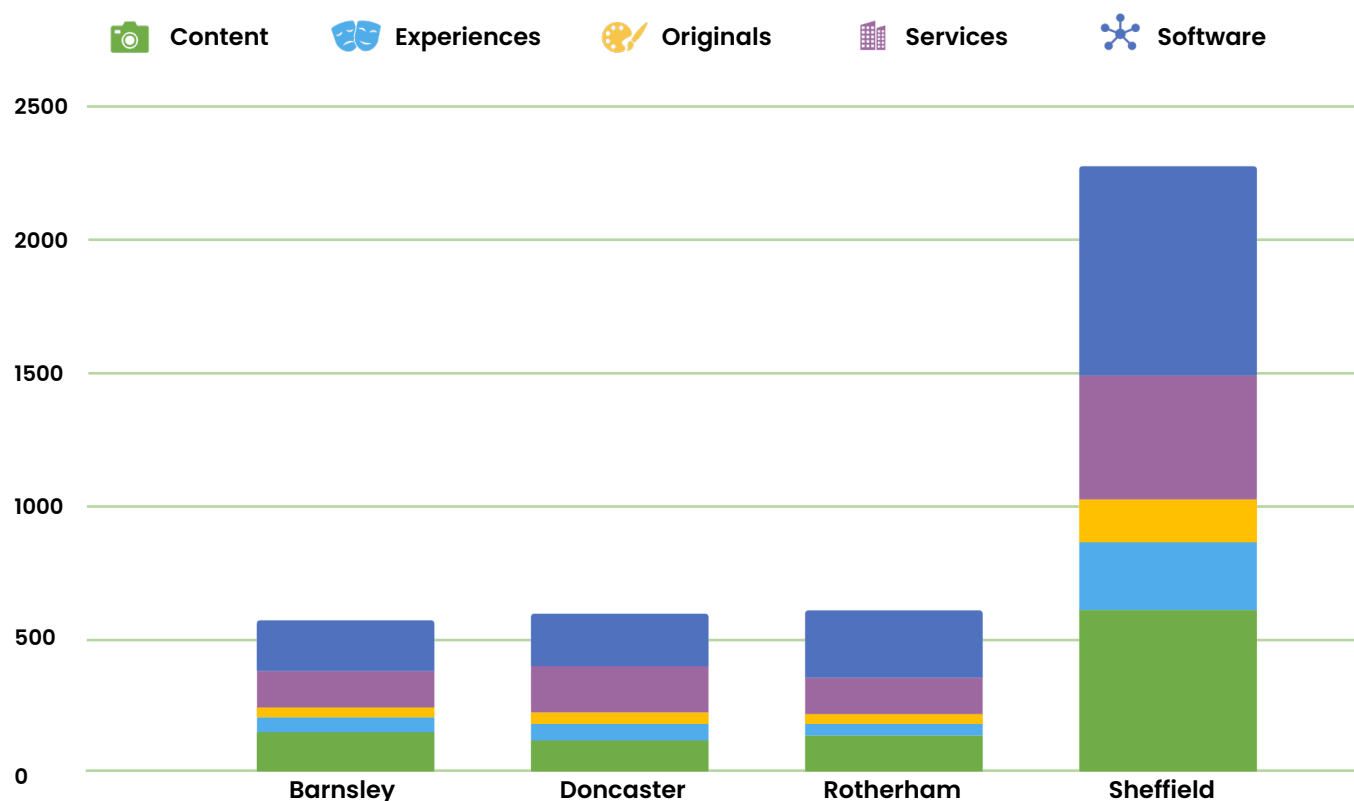


Figure 7: South Yorkshire CCI businesses by local authority and supply chain
The Fifth Sector/Curator Technologies 2022 (n=4,025)

Looking at the same data through a supply chain lens reinforces the greater scale of the Content, Services and Software supply chains in Sheffield.

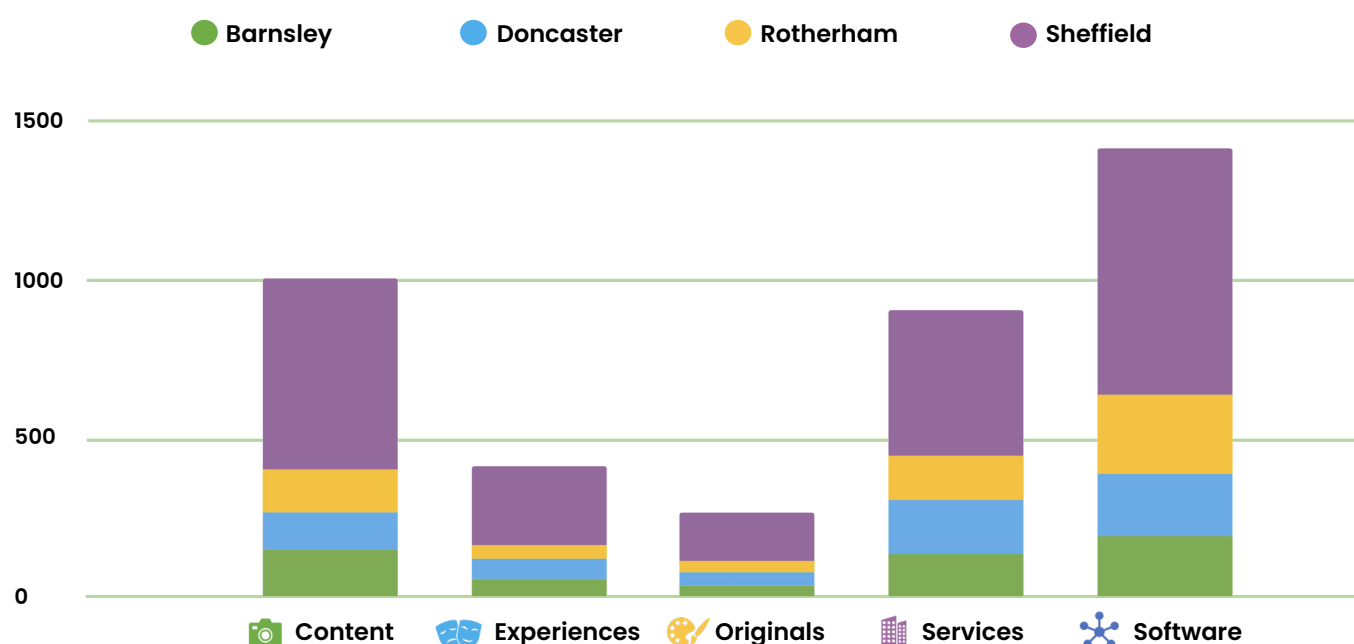


Figure 8: South Yorkshire CCI businesses by supply chain and local authority area
The Fifth Sector/Curator Technologies 2022 (n=4,025)

3. Sector Output

Lack of available financial data – owing to their typically small size, fewer than 5% of South Yorkshire’s CCI businesses file full accounts at Companies House – makes it more difficult to accurately aggregate and measure the sector’s economic output. This is compounded by the fact that, as noted above, only around 40% of the sector’s workforce is in regular employment which would allow their contribution to be measured through payroll data collected through ONS’s Annual Population Survey.

We have therefore devised a method to calculate GVA for Cultural and Creative Industries based on DCMS monthly sector GVA estimates.

Pros

- ➔ DCMS national estimates include the value of exports of creative goods and services (not available at a sub-regional level of geography)
- ➔ The method is repeatable without additional research and can be updated quarterly in line with timing of DCMS releases of new data.

Cons

- ➔ To estimate South Yorkshire’s share of national output, we must base this on BRES employment data – which, as we have shown above, underestimates the size of the total workforce.
- ➔ We have no specific index of CCI sector productivity for South Yorkshire, so have had to use a generic ONS index of the sub-region’s relative productivity across all sectors.
- ➔ The latest available BRES data cover the period April 2019 – March 2020 and are still provisional – so this an estimate of GVA in the year immediately prior to the COVID pandemic.

DCMS subsector	GVA (£m)
Advertising & marketing	49.0
Architecture	38.9
Crafts	12.2
Design & designer fashion	26.4
Film, TV, video, radio & photography	64.5
IT, software & computer services	436.1
Publishing	80.5
Museums, galleries & libraries	7.7
Music, performing and visual arts	42.3
Other cultural sector activity	103.2
Total South Yorkshire Cultural & Creative Industries	860.6

*Table 4: South Yorkshire CCI Sector GVA output
The Fifth Sector 2022.*

Interpretation of CCI sector output data

On the basis of this estimate, South Yorkshire accounts for less than 1% of UK creative industries output. GVA of the UK creative industries sectors for the calendar year of 2021 is estimated at £104bn, compared to about £95bn for the same measure in 2020. The comparable figure for 2019 was just over £107bn².

Surveys undertaken over the last 18 months suggest that the economic impact of Covid was not felt consistently across the UK's creative industries, with the burden falling disproportionately on live events sectors – live music revenues collapsed by around 90% in 2020³ – and areas with weaker creative economies. However, we will not be able to estimate its effect on sector GVA on this basis until at least the publication of provisional BRES 2021 data (expected in September 2022).

However, there are some more positive interpretations of the data.

- ➔ These estimates are calculated on the basis that South Yorkshire's overall productivity is 81.81% of the national average. **If South Yorkshire's CCIs are as productive as the national average, the sector output would be in excess of £1 billion per annum.** If the sector were as productive on average as the South East, this would increase to nearly £1.4 billion.
- ➔ The estimates are prepared using employment data which is likely to understate the size of the sector in South Yorkshire.
- ➔ This estimate does not reflect other indirect and induced outputs – including visitor economy income related to attendance of cultural events. For example, the value of music tourism alone in Yorkshire and Humber in 2019 was estimated at £264 million⁴ – if that were distributed in proportion to its population, South Yorkshire's economy would benefit by an additional £68 million.
- ➔ As a sub-sector of creative industries, investment in arts and culture has **direct and indirect benefits** to the economy. DCMS modelling shows that for every 1 FTE worker directly employed by the arts and culture industry a further 0.62 FTE jobs are supported through indirect effects. Furthermore, 0.84 FTE jobs are supported through induced impacts (see Figure 9 for definitions.) This implies that for every 1 FTE worker directly employed, a total footprint of 2.46 FTE workers is supported in the wider economy.

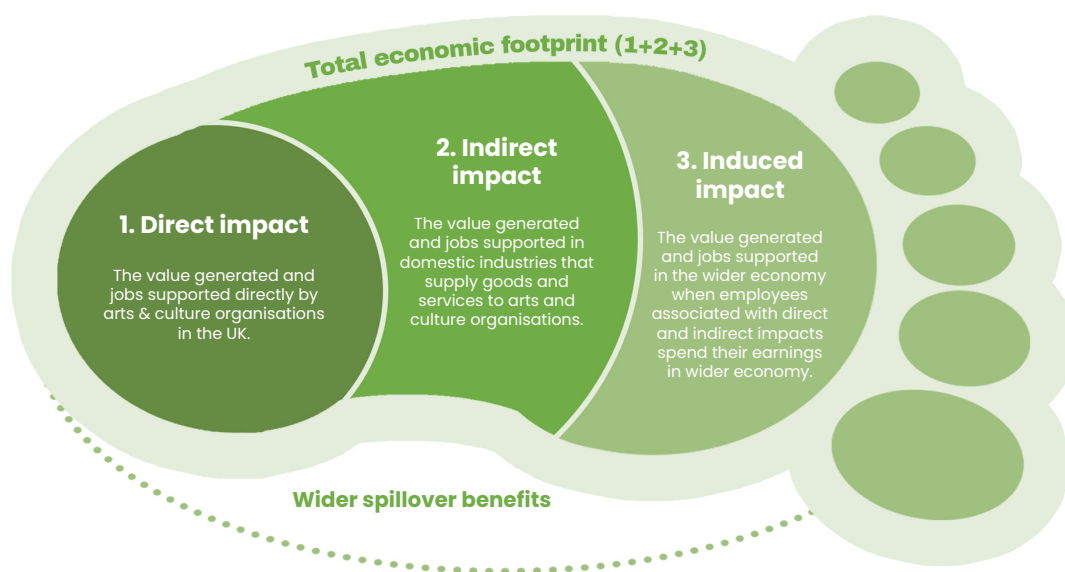


Figure 9: Cebr illustration of total economic footprint of arts and culture.⁵
Cebr analysis

Taking these factors into consideration, we estimate that the total economic output of cultural and creative industries in South Yorkshire is closer to **£2 billion per annum.**

Trends analysis: new business formation and survival

There is clear evidence of the rapid growth of creative industries across South Yorkshire since 2012. Beahurst data (which gives a higher estimate of overall business numbers, as outlined above) indicates that the stock of active creative businesses has more than trebled in the last decade, from below 1,500 companies to over 5,000:

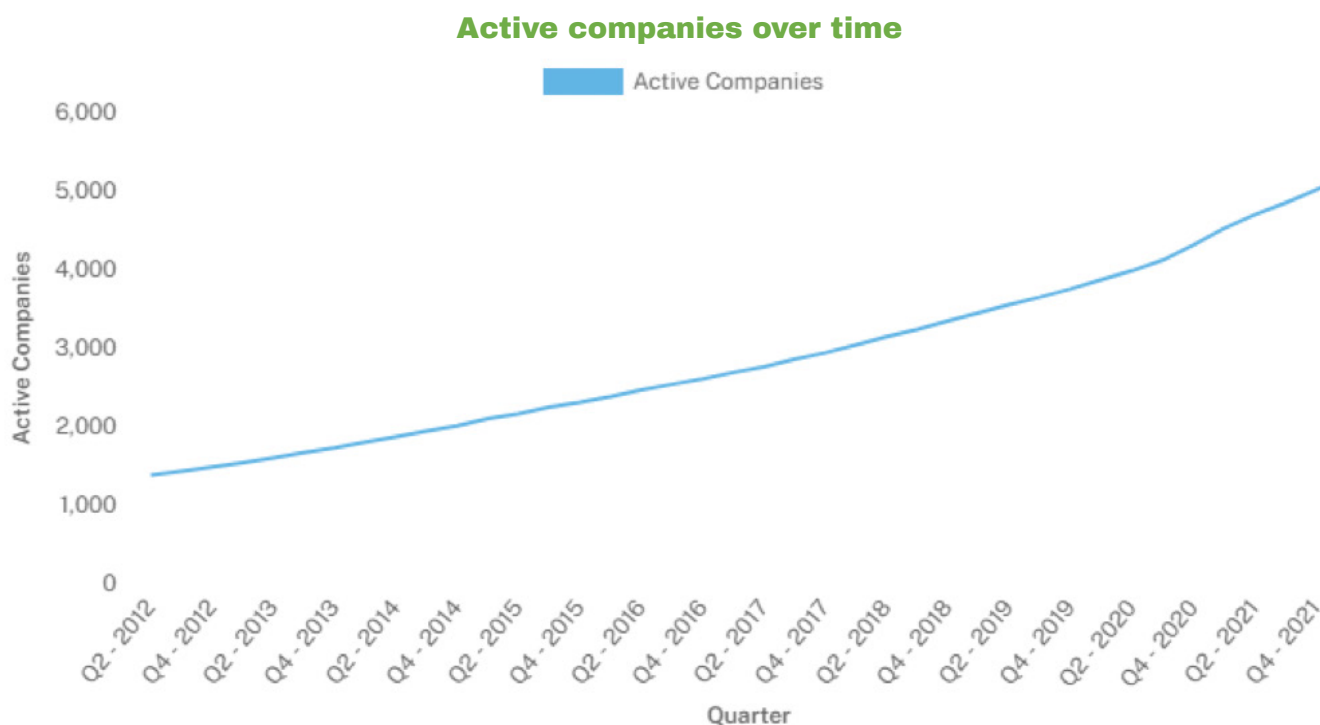


Figure 10: Growth of creative sector 2012-2021.
The Fifth Sector 2022

Looking in more detail, this shows that business formations increased above the long-term growth trend during the first lockdown – which is more apparent in Figure 11:

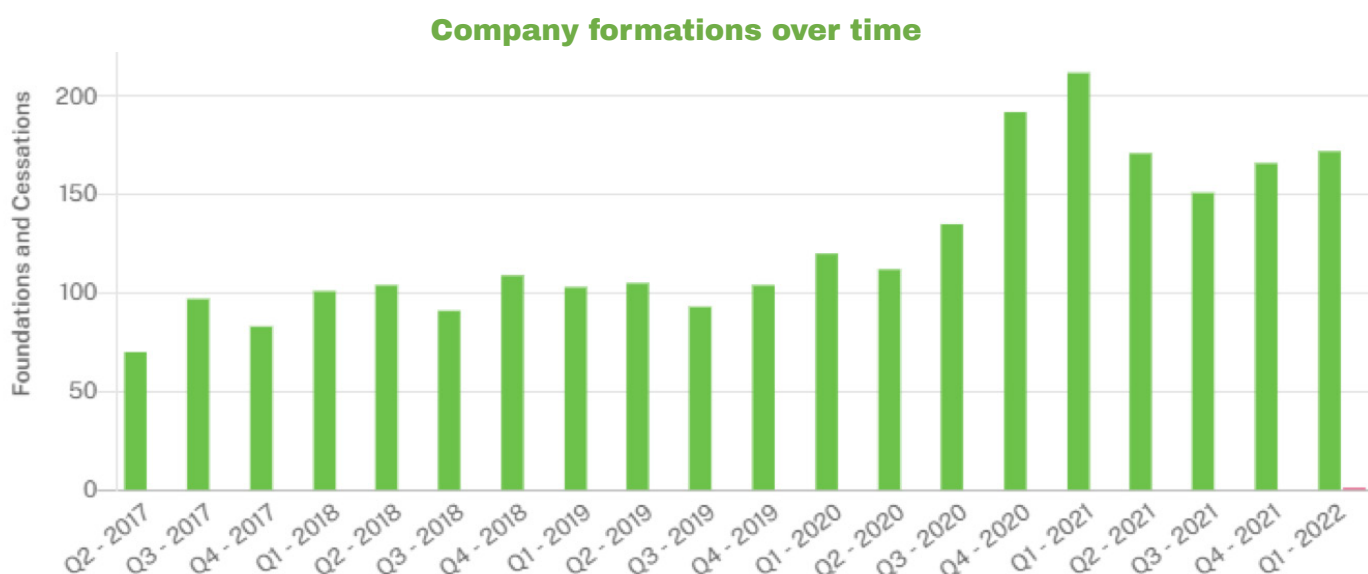


Figure 11: South Yorkshire CCI company formations and cessations 2017-2022.
The Fifth Sector 2022

Analysis of the 975 new creative business formations in the period from 23 March 2020 – the date of the first ‘lockdown’ – until end 2021 show a higher proportion of Content and Services businesses (shown in green and purple in Figure 12) than in the overall business population:

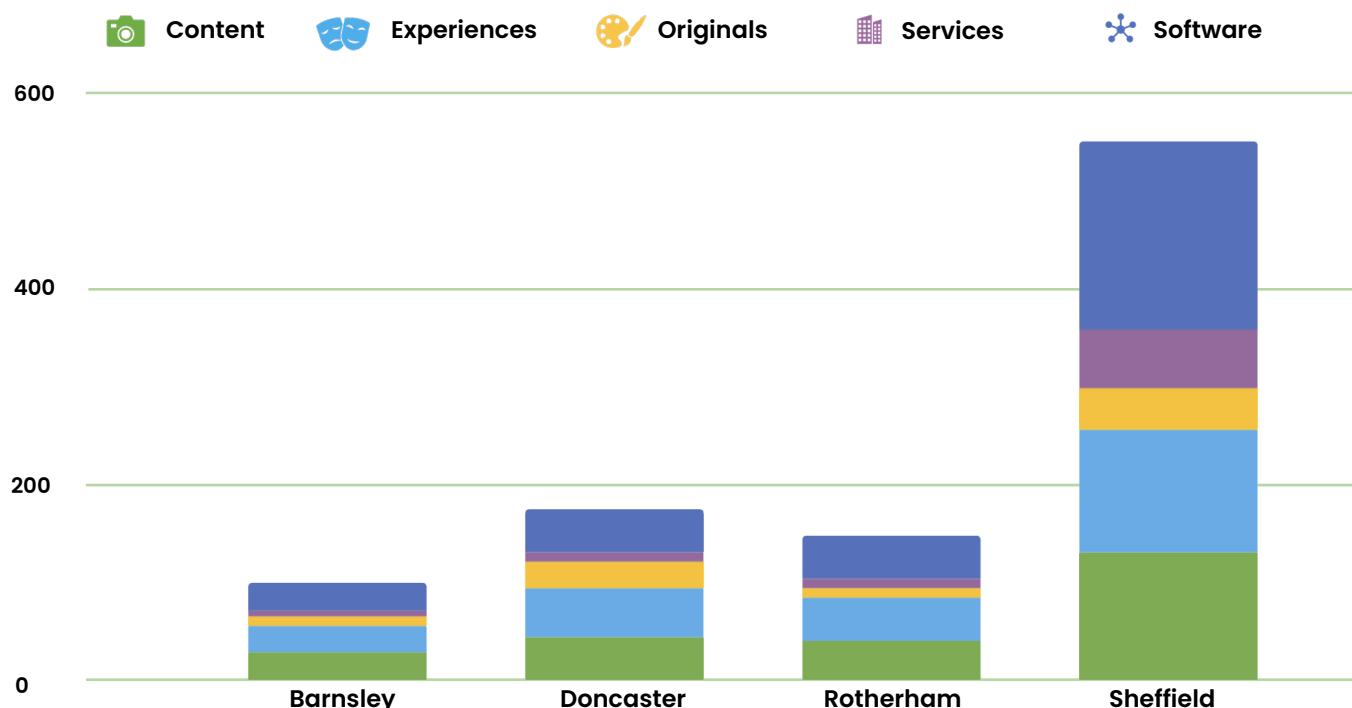


Figure 12: Supply chain analysis of CCI company formations 23 March 2020 – 31 December 2021. The Fifth Sector/Curator Technologies analysis of Companies House data. 2022 (n=975)

Interpreting the data on business formations:

There is no single explanation for this but there are both pandemic-related and other factors which may be contributing to growth:

- ➔ Individuals and teams being made redundant deciding to start up their own businesses
- ➔ Individuals in receipt of furlough opting to use their time to start a business
- ➔ Individuals taking advantage of more flexible working practices to relocate from London and the South East for reasons including wanting to be closer to family, cheaper housing/larger gardens, quality of life
- ➔ Increased inward investment in film and television production, boosted by factors including:
 - ⇒ Greatly increased investment in production by ‘streaming’ companies (eg, Netflix, Amazon, Disney +)
 - ⇒ Increase in the quotas for ‘Out of London’ production for UK Public Sector Broadcasters (BBC, ITV, Channel 4, Channel 5)
 - ⇒ Screen Yorkshire’s active promotion of the region’s facilities, locations and funding support for independent productions
 - ⇒ The relocation of Channel 4
 - ⇒ Demand in other creative sectors – eg, computer games – stimulating specialisation and growth in the supply chain for both specialist content, technology and marketing services

The creative growth paradox

More in-depth analysis of financial data and evidence of public funding for R&D reveals a less positive picture:

- ➔ Only 4.8% of South Yorkshire's CCI sector businesses file full accounts (i.e., the remainder re below the statutory reporting threshold)
- ➔ 101 companies – less than 2% have accessed grants for collaborative R&D at any point in their existence
- ➔ 36 businesses have secured equity investment
- ➔ The region is home to only eight CCI sector university spinouts
- ➔ Only six of South Yorkshire's CCI companies meet the definition of 'scale up' (20% growth year-on-year)⁶

This seems to present a paradox. How can the low levels of productivity and investment in R&D observed at a 'micro' level translate into the 'macro' picture of a sector which has consistently outgrown the rest of the economy for more than a decade?

Some of the explanations for this are structural. As highlighted in the section on sector output, above, the project-based, freelance and micro-enterprise dominated nature of the sector creates significant gaps in the official data record. The sector evidently derives a significant part of its economic value from the creation and exploitation of original intellectual property; but most of this is protected by copyright rather than more easily quantifiable patents and design rights. Value in the creative sector is primarily knowledge-based, with only a limited proportion of value generated by manufacturing – meaning that the footprint of its production infrastructure is often transient and hard to measure.

'Doing things weirdly'

But behavioural factors matter too, arguably more so than structural ones. The motivations of creative entrepreneurs differ markedly in some respects from their peers in finance, manufacturing or even the technology sectors with which they are often bracketed. That is highlighted by the illustration below, taken from a presentation by a computer games company at the National Videogames Museum in Sheffield in March 2022:



Figure 13: Doing things weirdly
@State_of_Play, March 2022

This slide brings out the different motivations and operating models employed by many creative businesses:

- ➔ Emphasis on intrinsic value rather than a business plan
- ➔ Project-based working, drawing on additional resource through collaboration rather than investment or acquisition of talent
- ➔ Portfolio working – the necessity of diversifying effort across projects which will keep cash flowing whilst larger projects are in development
- ➔ Process innovation – described here as ‘new ways of working’ – as part of the creative process, rather than a separate activity
- ➔ Most of all, ‘doing things weirdly’ – the importance of doing that which is distinctive, rather than following a business plan.

‘Doing things weirdly’ is a feature of creative industries, not a ‘bug’.

To take a term from software development, this intuitive, unplanned way of working is, ‘a feature, not a bug’; it is a proven business model and a deliberate choice, not a failure of the business owner to take responsibility for the outcome. The assets generated are not just tangible forms of IP – a game, recording, show, artefact – but reputational goods and knowledge exchange which result from collaboration.

One of the most significant challenges faced by SYMCA and local authorities is how to structure investment in the sector in a way which makes available working capital to support, encourage and develop those successful creative behaviours, rather than requiring security for those investments. If successful, this will:

- ➔ Ratchet up the knowledge intensity and innovation of individual creative entrepreneurs and microbusinesses,
- ➔ Seed the development of more dynamic clusters and supply chains
- ➔ Provide a spur to productivity, employment and business growth in the process.

Public investment in risk-taking – including de minimis grants – can stimulate and help unlock far greater levels of private investment from retail banks, angel investors, venture capitalists. One of the reasons why the performance of South Yorkshire’s creative sector lags other regions is that public investment in the region has focused heavily on advanced manufacturing and where investment goes, perception follows. Underinvestment in the sector means that, with notable exceptions such as Barnsley’s DMC, there is a lack of specialist physical infrastructure; but more important, it means that the region is lacking in the ‘soft’ infrastructure to support collaboration, investment in skills and the perception amongst local people that creative industries represent a viable and worthwhile career choice.

4. People and Skills

Creative skills pathways

Research into creative skills pathways followed the same sector supply chain definitions used for workforce and business mapping. Under the digital pathway, the skills work focuses on education and training in creative digital skills.



Figure 14: Creative Skills Pathways

Analysis of creative training and skills provision in the SYMCA region and wider Travel To Work Area

Our analysis shows that there are 24 providers in the SYMCA region delivering 331 different courses across the five creative pathways. Most are offered through universities (Sheffield only) or colleges. The biggest single provider is Sheffield Hallam University, with 93 courses on offer.

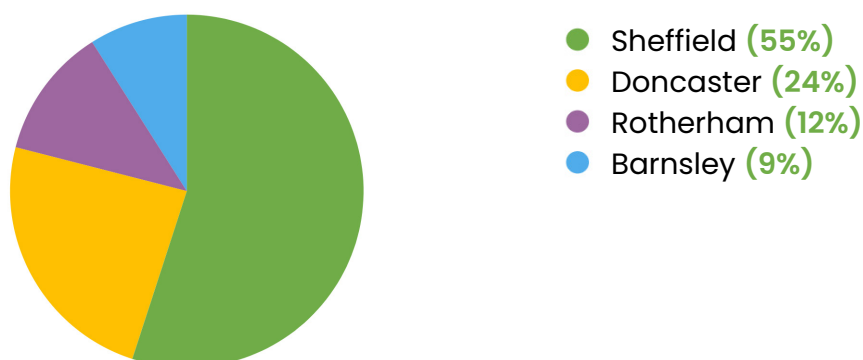







Figure 15: Location of learning/skills courses across South Yorkshire.
The Fifth Sector/Morra 2022.

Sheffield has by far the largest offering of courses within the SYMCA region (55%) followed by Rotherham, Doncaster and Barnsley.

The main providers across the SYMCA region are:

 Creative Content	Sheffield Hallam (43 courses), Rotherham and Sheffield Colleges (10 courses each), Barnsley and Doncaster Colleges (9 courses each)
 Creative Experiences	Sheffield Hallam, Rotherham, Doncaster and Barnsley Colleges
 Creative Services	Sheffield Hallam, Rotherham and Doncaster Colleges
 Creative Originals	Sheffield Hallam, Rotherham College and Doncaster College
 Digital Technology	Sheffield Hallam, Sheffield College and Barnsley College

Of these providers:

- ➔ **Sheffield Hallam** offers courses across all five pathways, mainly at the higher levels of 6 (undergraduate degree) and levels 7/8 (Masters and doctorate).
- ➔ **Doncaster College** offers an excellent range across all five pathways and at all levels, including at degree level (accredited by University of Hull).
- ➔ **Barnsley College** has courses across all 5 pathways, including two degrees accredited by University of Hull. It also offers one of the new T-levels (Digital Production & Design) It is one of the few FE's to offer short courses (eg, photography).
- ➔ **Rotherham College**'s offer extends across four pathways (not digital technology) with good coverage at Levels 1,2 and 3. There is an emphasis on Creative Experiences (eg, media make-up, music performance), a good range of digital interactive courses and new eSports courses.
- ➔ **Sheffield College** offers a range of A levels in creative courses.

The South Yorkshire region is well catered for with learning pathways and courses across all five creative pathways:

- ➔ There is an ample supply of learning provided for both Creative Experience and Creatives Services pathways.
- ➔ There is room for development around Creative Content. This may be as the pathway is more than adequately catered for in the wider Travel to work area, particularly in Leeds where the presence of Channel4 has seen a huge growth in courses targeting the TV and film industry.
- ➔ The lesser number of courses available in the Creative Originals pathway (eg, arts and design) reflects recent funding changes (particularly in universities).

Gaps in provision across SYMCA region

There is good provision all levels and across all five pathways within formal learning institutions. But alternative entry routes into the sector (eg, apprenticeships) are limited. There are only five creative apprenticeships available in the SYMCA region:

- ➔ One at Barnsley College (Level 3 Junior Content Producer)
- ➔ Two at Sheffield College (Digital Marketer at Level 3 and a Software Developer at Level 4)
- ➔ A degree level apprenticeship in Product Design available at AMRC training (part of the University of Sheffield)
- ➔ A Digital Marketer Apprenticeship at Level 3 available at Baltic Apprenticeships in Sheffield.

We understand that Sheffield Hallam University has prioritised the need to develop more degree apprenticeships and will offer two new Level 6 creative apprenticeships from September 2022 – one in [Creative Digital Design](#) and another in [Digital User Experience](#).

In July 2022 it was announced that Sumo Games (through its Sumo Academy) is now a Registered Training Provider to deliver a [Level 7 apprenticeship in Games Programming](#) working with a range of employer partners including Playstation London Studio, Rare, nDreams and Aardvark Swift in Rotherham.

Training available in a wider Travel To Work Area (TTWA)

In the wider TTWA (including Leeds, Kirklees and York) there is a more comprehensive offer, with an additional 28 providers offering a total of 548 courses.






Skills Pathway	South Yorkshire		Rest of Yorkshire (Travel To Work Area)		Total
	No. of courses	% of total	No. of courses	% of total	
 Creative Content	93	34%	178	66%	271
 Creative Experiences	117	42%	161	58%	278
 Creative Services	102	47%	117	53%	219
 Creative Originals	41	46%	48	54%	89
 Digital	9	41%	13	59%	22
All	331	48%	548	62%	879

Table 5: Training provision across wider Yorkshire TTWA
The Fifth Sector/Morra 2022.

Online delivery

A further 134 courses are delivered online, mostly from organisations based in Leeds, bringing the total number of courses available across the wider TTWA to 1,013. Since mid-2021, there has been a significant increase in online courses available to the sector, mainly in TV and film. Most of this supply comes from ScreenSkills, which now deliver more than 80% of its courses online. There

is an emphasis on free online courses for new entrants, with new e-learning modules aimed at those looking for a first step into the sector (eg, *Getting Into The Screen Industries*). Another major provider for the sector, National Film and TV School (NFTS) also now offers a significant range of online “bitesize” courses including “virtual classroom” courses from Leeds.

This move to online comes on the back of the pandemic. ScreenSkills invested in the delivery of online learning in response to Covid-led skills gaps, eg, the need to give production teams Covid safety training quickly.

As the TV and film workforce is largely freelance and drawn from across the North and Midlands, online training offers greater reach.






Total of Pathways	F2F	Online	Total
 Creative Content	271	104	375
 Creative Experiences	278	0	278
 Creative Services	219	29	248
 Creative Originals	89	1	90
 Digital	22	0	22
All	879	134	1013

Table 6: Comparison of face-to-face and online training delivery
The Fifth Sector/Morra 2022.

Comparison of SYMCA and TTWA offers

Analysis of the wider offer, including online delivery, highlights the prevalence of Leeds, which has a good offer across all levels of learning, including continuing professional development (CPD). Sheffield’s offer is closely aligned in terms of formal education but lacks a CPD offer.

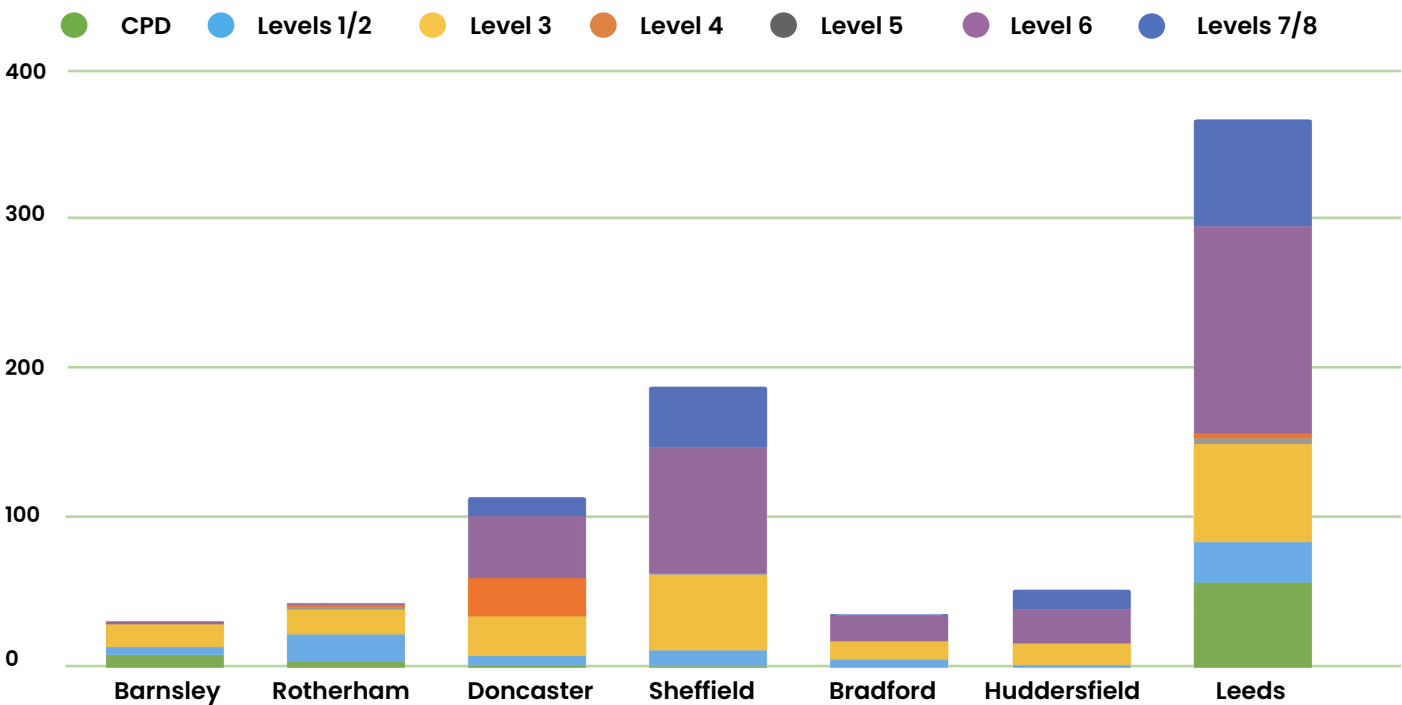


Figure 16: Location of training courses across Yorkshire TTWA.
The Fifth Sector/Morra 2022.

Equality, diversity and inclusion

Context

This piece of work was set against a backdrop of social, economic, and civic inequality and activism.

Black Lives Matter catalysed awareness of structural economic and social inequalities and injustices across society, including the cultural and creative sector. This was compounded by the impact of Covid-19 across the board but with a disproportionate impact on black and Asian people, disabled people and those living with life limiting or underlying health conditions.

For South Yorkshire, this was overlaid with the multiple indices of deprivation and poor health outcomes, and so increasing diversity and inclusion is treated as a given in our analysis.

Across South Yorkshire, there is a very strong and urgent need to improve representation so that the creative, cultural and visitor sectors are reflective of the diversity of the region. Existing business support and skill development fails to truly reflect the diversity of local, national and international audiences, visitors and consumers the workforce needs to look like the people it seeks to attract. A lack of skilled diverse talent to grow the cultural and creative economy and assets has a direct correlation on the impact of diversifying audiences.

What do we mean by diversity?

The protected characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

Inclusion needs to reflect the broadest protected characteristics. For South Yorkshire, this means that socio-economic background and the intersectionality of socio-economic background and the other characteristics assume particular importance, taking into account such factors as zero-hour contracts and gender-based care responsibilities.

Our findings, and those of Opus Independents' wider engagement with the arts, culture and heritage sector suggest there are equity actions to be implemented to achieve this. These fall into broader categories:

Equity - talent

There are limited opportunities to progress, whether at entry-level, mid-career or in senior positions, resulting in skills gaps and shortages at all levels of the creative industries and a talent drain. Those gaps exacerbate a lag in the growth cycle of creative businesses, which in turn impedes the development of viable career paths for new entrants, early career artists and more experienced creative and cultural professionals.

Neither formal skills and training provision nor existing business support networks, including South Yorkshire's public-sector backed innovation and scale up ecosystem and university partnerships, reflect the critical and growing importance of engaging creative cross-over and knowledge exchange between sectors. South Yorkshire's creative entrepreneurs and practitioners need a framework which supports an agile, fluid, opportunist approach to skills, building on the regional

legacy of creative and digital experimentation exemplified by Fon, Warp, Cabaret Voltaire and others.

Failures both to develop diverse talent from local communities and to attract and retain it from elsewhere are reflected in the underperformance, lesser scale and lack of productivity of South Yorkshire's creative industries relative to other city regions.

Equity- audiences/participants

In line with our interviews, and the express wishes of those with lived experiences, and aligned with new initiatives such as ACE's Priority Places and their emphasis on inclusion and relevance in their Investment Principles, there is a clear need to move beyond instrumentalism when referencing communities and reframe cultural engagement and co-production, design and creation. The region presents some examples of good practice in this respect – notably Rotherham's culture-led approach to the renewal of its governance and services delivery approach – but best practice needs to be shared and become universal.

South Yorkshire still reflects disproportionate under-employment/self-employment across ethnicity, LGBTQI+ and disability; participants and interviewees with those protected characteristics felt a definite inequality.

“As long as underrepresentation exists, however, the sector and the networks can feel exclusive and inhibiting.”

Inclusion

With very few exceptions, current cultural provision and access to training, jobs and opportunities do not take account of or reflect any nuanced diversity. This is a serious concern in terms of “levelling up” and optimising life chances for people – including young people – across South Yorkshire. There is little or no evidence that consideration has been given to lived experience or any kind of diversity and socio-economic challenges within existing training, private sector networks or public sector support for creative industries.

Other considerations also need to be balanced: cost of transport, access to kit, education and literacy equity, and equality of inclusive access. This could include access to work education for employers, multiple formats (easy read, video etc) for inclusive recruitment and an understanding of embedded cultural and social perceptions which lead to ‘imposter syndrome’ in parallel with judgements on talent (education and experience) and what constitutes cultural value and taste.

As long as underrepresentation exists, however, the sector and the networks can feel exclusive and inhibiting. Simultaneously, this means the sector is not creating content which reflects diversity as the potential to address global audiences and missing the opportunity for South Yorkshire to be a market leader.

There is a role here for SYMCA to convene and hold space; to broker and facilitate. Working in this way can address equality, diversity and inclusion cohesively and collectively and in a way that is reflective of the people of South Yorkshire as it is now and how it will be. Ensuring that EDI is an approach not just an outcome means it can flex and adapt as both local and national societal environments change.

5. Local authority consultation

Consultation with the four local authorities in Barnsley, Doncaster, Rotherham and Sheffield revealed both a breadth of ambition and a distinctive and differentiated focus on opportunities to invest in growing creative jobs and businesses in each area.

Each local authority has existing or emerging strengths which respond to the differing identities and capabilities of each place. For example:

- ➔ **Barnsley's** initiative in establishing DMC and the sector specific Launchpad business support service has paid dividends in terms of the ability to attract and retain investment across digital and creative supply chains.
- ➔ **Doncaster** recognises the opportunities presented by its logistical advantages (East Coast Main Line, airport, two motorways) to bring forward capital developments for creative production as a way to catalyse and accelerate the regeneration of its city centre.
- ➔ **Rotherham's** ground-breaking decision to use culture to rebuild community trust and cohesion has created the conditions for a transformative approach to the role of young people in culture, manifest in the Children's Capital of Culture.
- ➔ **Sheffield** is forging partnerships with its cultural and educational institutions which build upon its legacy as an incubator of musicians and designers and its status as the UK's greenest city to promote the region to a new generation of creatives and investors.

The capital and sector initiatives discussed at the respective round tables were complementary; but that is more the result of serendipity than a coordinated approach to sector investment. Therefore, one of the recommendations from this work is that SYMCA should establish a regional panel which brings together planning, investment and regeneration, skills, business support, cultural and creative specialist team members for the MCA and local authorities to help shape the business case for strategic intervention and support development of funding applications for individual projects.

The evidence base gathered through this research will complement data held by the local authorities in developing their own plans and business cases for investment.

Barnsley, Doncaster and Rotherham have opportunities to leverage their status as areas eligible for funding for 'levelling up' through culture, complemented by Arts Council England priority area status in the case of Barnsley and Rotherham. Other opportunities within the third round of Cultural Development Funding, including support for high-growth creative businesses, present an opportunity for SYMCA to demonstrate leadership and leverage Sheffield's larger business base.

Looking further afield, the distinctiveness and excellence of some of the approaches taken at local level present SYMCA with an opportunity to take leadership of initiatives to develop a distinctive Northern place-based approach to culture, building on its engagement with the NP11 cultural strategy.

6. Recommendations

Skills

As creative technology rapidly advances, more and more creative workers will need “cross-over” or “fusion” skills combining creative and technical disciplines. A growth in digital occupations both related to the technology sector and the wider creative industries is a key area of skills development over the next five years.

In this rapidly changing digital environment, the collaboration between creative business and education has never been more essential. Opportunities for SYMCA to take the lead in developing provision of creative skills include:

- Grow an education collaboration network, which would have a clear and more cohesive approach to the higher-level skills needed for the creative sector.
- Encourage universities to fill the gap in professional skills by developing and offering more short courses more aligned to business need for the sector.
- More targeted marketing to the sector (in a language they understand) could increase take-up of existing business support (eg, Skills Accelerator).
- Local marketing of existing sector-specialist support, including the new online courses for new entrants to the TV and film sector.
- Further research to establish whether the ScreenSkills examples give any pointers for ways in which HE, FE, private providers and the sector in South Yorkshire can come together in a more agile way to use online delivery to address gaps in training supply across the cultural and creative industries to help address known skills gaps and shortages.



Film and television

City and regional investment marketing should more effectively communicate the strengths of established high-quality regional creative assets including the Children's Media Festival and Sheffield DocFest.

South Yorkshire has been 'free riding' on Screen Yorkshire's inward investment, talent development and crew database services for film and television. This reduces any influence SYMCA and local partners may have on investment decisions, limits opportunities for South Yorkshire residents to benefit from skills development opportunities and is unlikely to be sustainable. SYMCA should agree a package of support to ensure that local talent, supply chain businesses and locations continue to benefit from Screen Yorkshire's expertise, talent development and investment marketing.

The growth of short-form content – including on platforms such as TikTok and Instagram – offers both creative and commercial opportunities to a wider and more diverse community of content makers and marketers. Development of those skills pathways and routes to market should sit alongside those for film and high-end television.

Screen businesses should be engaged in identifying, planning and – where appropriate – lobbying for investment in the required infrastructure, both in terms of new capital developments and to enable the full potential of remote working and workflows.

Music

Sheffield, in particular, has an international reputation as a seedbed for innovative new music. If this is to remain a 'live' legacy, concerted action of public and private sector actors is needed to ensure that musicians and music enterprises across South Yorkshire can successfully develop their talent and market opportunities.

Recommendations of the 2019 Sheffield City Region Music Report⁷ still apply:

- ➔ Opportunities for emerging talent – ensuring that all young people, regardless of their background, should have access to music in education and should be able to pursue a career in music.
- ➔ Protecting grassroots music venues – offering business rate relief and help with licencing to venues as well as improving accessibility at venues for deaf and disabled audiences and performers.
- ➔ Developing music businesses – leverage powers to support the growth of the music businesses which in turn will increase employment and productivity.
- ➔ Integrating Transport – creating a transport system that is fit for purpose and that supports the night time economy.
- ➔ Reaching out to every corner of the region – Mapping all music activity across the region recognising that different parts of the region have different needs and challenges

PRS Music has recently imposed a 60% cut in funding for PRS Foundation, which sponsors the PPL Momentum Accelerator for Yorkshire⁸ and through it supports the development of both musicians and music entrepreneurs across Yorkshire. SYMCA needs to speak to the organisers to see what further support may be needed to sustain this valuable provision.

SYMCA and local authorities should establish a music policy forum to look at adopting a consistent approach to issues with a direct impact on the promotion of live music, including:

- ➔ Enforcing Agent of Change requirements in planning for new developments which place responsibility for issues such as soundproofing and access on the developer rather than threatening the continuation of established music venues
- ➔ Licensing of venues (in particular, to ensure that there is no discrimination against venues promoting urban music genres)
- ➔ Policing and public safety

Computer games and digital content

South Yorkshire has significant 'anchor' investors in computer games and wider areas of digital content and convergent media. The larger players, including Sumo and Zoo Digital, generate significant demand for jobs and skills and contribute tens of millions of pounds to the regional economy each year. In turn, they support a supply chain of smaller digital creative businesses and skilled contractors essential to the region's capacity to respond in an agile way to future opportunities across games, film, television and short form content of all kinds.

The region also benefits from the experience and expertise of Barnsley DMC, in particular the successful Launchpad business support programme (not to be confused with the music Launchpad cited above.)

Every region in the UK experiences skills gaps and shortages in games – in some cases coinciding with those in other high value creative and digital content sectors. The action taken by Sumo to seek Registered Training Provider status to address its own needs offers potential to catalyse a wider public-private skills partnership including both HE, FE and smaller supply chain businesses to ensure that South Yorkshire becomes the best place to acquire skills for making games and digital content.

That needs to be matched by a campaign to promote the value of local creative and digital producers to angel and VC investors, and to ensure that the regional business support and innovation ecosystem is attuned to the needs of digital content entrepreneurs.



Equality, diversity and inclusion

- ➔ Increase lived experience or awareness amongst commissioners of skills training and business support.
- ➔ Invest in the recommendations and reputations of diverse led creative businesses and producers (there are some significant people in South Yorkshire).
- ➔ Collaborate with disabled/neurodiverse/D/deaf practitioners and disabled led organisations to look at inclusive access framework for creative occupations (not just physical access but well-being, remote working, adjustments etc.) for disabled, D/deaf and neurodiverse people).
- ➔ Collaborate with LGBTQI+ practitioners and queer led organisations to look at inclusive access framework for LGBTQI+ artists, creatives and audiences.
- ➔ Collaborate with ethnically diverse practitioners and ethnic-led organisations to look at inclusive access framework for ethnically diverse artists, creatives and audiences.

These could be addressed through:

- ➔ Employer training programmes on disability access to work.
- ➔ Employer training programmes and resources on inclusive recruitment.
- ➔ Leadership development (early and mid-career)

Endnotes

1. Business Register and Employment Survey, Sept 2022. (<https://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/businessregisterandemploymentsurvey>)
2. Creative Industries Council: Positive Trend In Economic Recovery Of UK Creative Industries From Pandemic, 4 May 2022. (<https://www.thecreativeindustries.co.uk/facts-figures/positive-trend-in-gva-of-uk-creative-industries-from-pandemic>)
3. UK Music (2021). This Is Music 2021. (<https://www.ukmusic.org/research-reports/this-is-music-2021/>)
4. UK Music (2020) Music Tourism Map (<https://www.ukmusic.org/research-reports/uk-map/>)
5. Centre for Economics and Business Research, Contribution of the arts and culture industry to the UK economy: A Cebr report for Arts Council England, May 2020. p. 5.
6. The Fifth Sector analysis of Beahurst, March 2022 – n >5,000 companies
7. UK Music (2019). Sheffield City Region Music Report. (<https://www.ukmusic.org/research-reports/sheffield-city-region-music-report/>)
8. Branded as Launchpad. (<https://www.launchpad-music.com>)

Appendix One: Skills Providers

Leading training providers - by institution

Provider	Courses
Sheffield Hallam University	93
Doncaster College	83
Rotherham College	43
Sheffield College	32
Barnsley College	32
University of Sheffield	19
Longley Park Sixth Form	9
All Saints Catholic High School	6
Tapton Secondary School	6
Higher Rhythm Doncaster	5
Meadowhead School Sheffield	5
Notre Dame, Sheffield	5
King Edward VII – Upper School, Sheffield	4
UTC Sheffield City Centre	4
Forge Valley School	3
Silverdale School, Sheffield	3
King Ecgbert School	2
Sheffield Girls	2
AMRC Training (via University of Sheffield	1
Showroom Workstation	1
Back2Work, Rotherham	1
Armada	1
Baltic Apprenticeships	1
Chapelton Academy	1
Shipley College	1

Leading online course providers

Provider	Courses
ScreenSkills (National)	48
National Film and TV School (National)	30
National Film and TV School (NFTS – Leeds)	23
Noble Prog	19
Best Practice Training	5
M Training (Leeds)	2
XChange Training	2
Centre of Screen Excellence (Screen Yorkshire)	1
Aspire Training	1
Foursquare Training	1
Leeds University	1
York University	1



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