Report for Coastal West Sussex to develop a strategic plan for the facilitation of an advanced creative digital economy

Evidence Base

Final Version 1

December 2021

Contents

Creative Digital Report for Coast West Sussex:

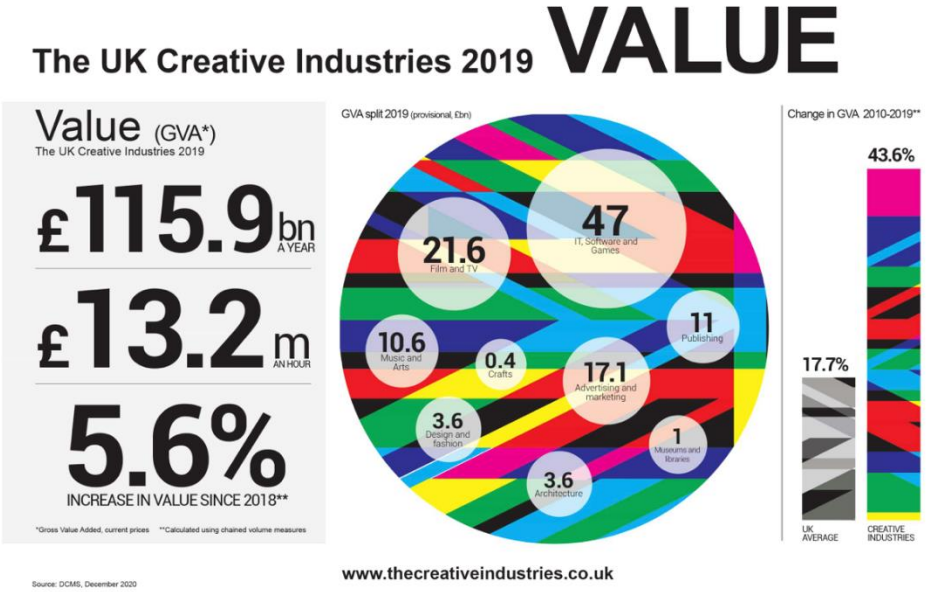
Evidence base and preliminary recommendations

"What has become really interesting about creative digital technology is that it has developed in the last year or so from working on the more forward-looking formats of Virtual Reality and Augmented Reality which have yet to become really mainstream, to informing a way of producing ... for broadcast media and film today. Combined with game engine software, this has widely entered the vocabulary as virtual production. And that's become a hugely significant development for the industry as well as being a big component of what will come in future VR and AR formats. A really interesting collaboration...it's not just about savings and efficiency or better tools for design. It's also about enabling a creative vision that would otherwise be impossible, enabling camera angles that are physically impossible to be created and so on"

Jeremy Silver, Chair Catapult Network / CEO Digital Catapult.

About this Report

It is an exciting and vibrant time for the burgeoning UK Creative Industries as Games, Film & High-End TV especially, drive the strongest sector of the UK economy.



The purpose of this project is to provide guidance and direction to Coastal West Sussex on the strategies and tactics required to capitalise on this sector growth and develop a successful Creative Digital sector along the coastal corridor between Brighton and Chichester.

The objective is to connect, integrate and grow the existing digital production and creative industries assets across the south coast from Chichester to Brighton. Working from local to regional, building from grassroots to industry, we intend to develop a plan that creates a coherent vision for regional development and investment across the coast and for unifying the future needs of the educational and commercial sectors that too often operate as local silos.

The coastal region faces significant challenges from; inconsistent educational attainment, an unbalanced creative and tech skills pool of talent and a lack of identity across the sector. These issues are shared with other cities and regions within the UK and presents an insight into the failures of local and national government, education and industry to engage with each other around specific regional needs and skills.

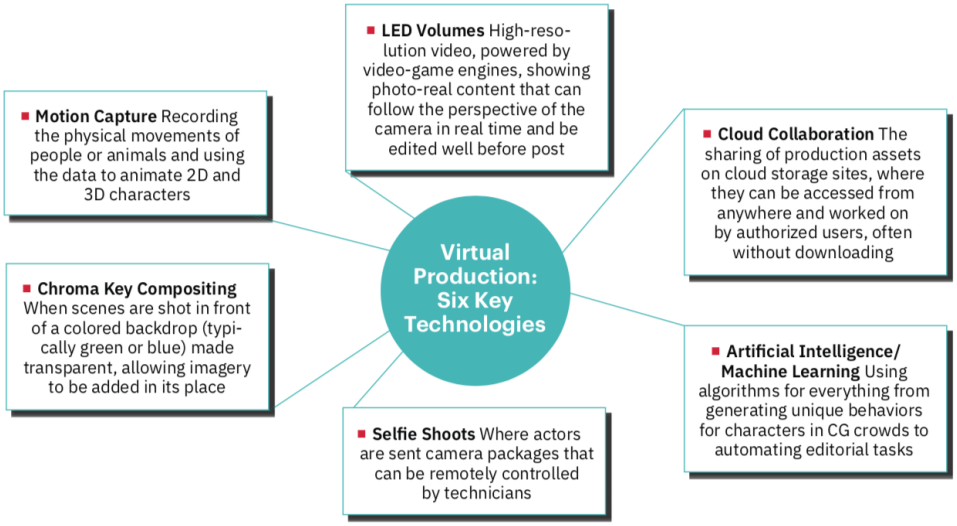
This report is the first of two documents that are designed to inform a debate to enable policy makers, business leaders and influencers to understand what already exists, what challenges are faced (especially in education) and subsequently engage in a discussion about how to enhance and expand the sector with strategic interventions and investments. We are looking at ways that we can help creative digital businesses and organisations generate value, but also to ensure that the value is retained locally.

This first report is designed to help attract investment by forming a sound evidence base for any proposition. It recognises that the plan will need to consider and build on:

- Existing Businesses, skills, capabilities and assets
- The connection with education and new skills, especially in relation to Gaming & Esports
- The breadth of the creative digital industry
- Current and future growth opportunities within the creative digital industries
- The physical, spaces, assets and resources required

The second report presents a discussion of the opportunities that might be developed. A specific focus of the project is to create and enhance 'virtual and distributed production' activity across the region.

Virtual production involves synchronous and asynchronous collaboration using digital technologies, often integrated with physical elements such as sets and performances, to create, capture and distribute films, TV, music, theatre, immersive and other creative content, in recorded form and / or directly to live audiences.



Our approach is based around the idea of Smart Growth[1]. "Increasingly, there is strong agreement that innovation is the key factor in promoting competitiveness in a globalizing knowledge economy."[2] The concept of Smart Growth is focused on developing the innovation potential of regions, recognising that the capacity to innovate is dependent on local factors; business culture, skills, education, research

[1] Commission Communication – Europe 2020: a strategy for smart, sustainable and inclusive growth. COM(2010)2020, 3 March 2010

[2] Asheim et al (July 2011), Constructing Regional Advantage: Towards State-of-the-Art Regional System Innovation Policies in Europe? European Planning Policies, Vol 19, No 7, Routledge

capacity, investment and finance and creative potential. It recognises that innovation is increasingly diverse, complex and can involve many stakeholders. It is based on a wider view of innovation that is not just technology based but recognises creativity in general and the value of open innovation systems, centred on collaborative networks and communities.

When activity is distributed with a defined geography or cluster it often involves a temporary or permanent coalition of dispersed organisations that pool or share resources in order to achieve common goals, or a subset of production enterprises and related support institutions within a cluster that is formed for the timely implementation of a new project.

A note on definitions and data sources

> *"Capturing tomorrow's market requires us to define it"*
>
> Accenture Tech 2021 Report[3]

The brief for this work was to develop an evidence-based plan for the development of the Creative Digital sector in Coastal West Sussex. *Creative Digital* as a term is an attempt to focus analysis on the application of creative thinking, processes and activities that deliver value by utilising digital technologies and platforms to make, move or manipulate content.

Examples would include games companies, digital marketing agencies, those working in web design and build, music and video production outfits.

It is a useful term in that enables us to examine what is known to be an existing strength for Brighton & Hove[4] and perceived to be one in CWS, that value is generated and enhanced when creativity is married effectively to digital technologies.

However, Creative Digital is not a term that is formally recognised at a national and international dataset level, and a number of broadly similar variations are currently in use. The Brighton Fuse research used the term CDIT (or Creative, Digital and IT)

[3] Accenture Technology Vision 20201 report. https://tinyurl.com/yueeh3mc

[4] http://www.brightonfuse.com

and the Bristol City Region uses a version of that in CDT (Creative Digital Technology)[5]

The most common and widely accepted term to cover the sector that this report is examining is of course the Creative Industries.

The Creative Industries are a government (and EU) defined sector for which exists a government department (DCMS). Specific Creative Industries data is therefore collected and collated and this supports the delivery of research reports[6], national strategies, priorities and resources.

The Creative Industries are defined by DCMs as:

"***Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property***"

The Creative Industries have often been subdivided into these 3 categories:

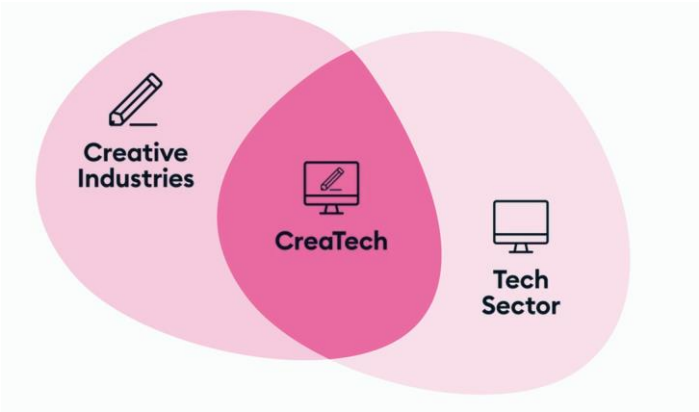
1. Dependent on human contact - theatres, cinema, festivals, performances.
2. Content production delivered remotely (primarily digitally) – in TV, Film, games, VR.
3. Supplying client services – design, advertising, PR, social. Activity dependent on the health of the wider economy.

The Creative Industries does include digital activity like video games and software, but it is also often expanded to include small scale craft activity and tends to exclude ICT technology innovation.

There has recently been the rapid rise in the use of a new term *CreaTech* (an aggregation of Creative Technology), which looks to capture the growing importance of the way that new and emerging technologies (both hardware and software) enable audiences to access creative content in new ways. CreaTech is a framing that is now widely adopted by Government-funded agencies such as the Digital Catapult and Tech Nation. Consequently, there is a steadily growing body of research data for this sector.

[5] https://bristolbathcreative.org

[6] https://www.pec.ac.uk



CreaTech is also not necessarily a simple match to Creative Digital. As a term it tends to focus on tech innovation, especially in new technologies like Immersive, Artificial Intelligence and 5G.

In this report we have used data and research that is focussed on the DCMS definition of the Creative Industries and, to a lesser extent, CreaTech. This gives us a statistical evidence base that is empirically recognisable by the Government and the public sector. The main points from the 1-2-1 interviews are then summarised in a separate section.

How that quantitative and qualitative information helps define the sector we both have and want to create (and the value of the term Creative Digital in enabling that), would need to be debated. It was initially used as the focus for this work on the basis that it has these strengths:

- It highlights an acknowledged regional strength (see, for example, Brighton Fuse)
- It differentiates CWS from the many other regions that are developing more traditional Creative Industry strategies
- It is a more value-focussed term than Creative Industries, but a broader and more encompassing term than CreaTech
- Creative Digital recognises the direction of travel - more and more of the Creative Industry categories (e.g. architecture, music) are increasingly developed, distributed and experienced via digital technologies.

The Impact of the Creative Industries:

At the national, regional & local level

It is worth first emphasising the current and potential economic impact of the sector, since some business respondents to our surveys and interviews suggested that local and regional politicians were not fully aware of this, and so may not be effective advocates.

The national size and significance of the Creative Industries and CreaTech

In the United Kingdom, the Creative Industries directly contribute over £115.9bn annually to the economy (DCMS, 2021). That is more GVA than the automotive, life sciences, aerospace and oil and gas industries *combined*[7].

The UK's Creative Industries now employ over 2.1 million people[8].

The sector grew by 7.4% in real terms between 2017 and 2018, compared to a 1.4% rate of growth for the UK economy as a whole. In 2018, the creative industries exported £46bn in goods and services worldwide and accounted for almost 12% of UK service exports

Growth in Creative Industries sub-sectors during that period include architecture up 7.8%, advertising and marketing up 11.5%, and creative tech (including games) up 10.3%. Music, performing and visual arts grew by 2.3%, publishing by 3.5%, crafts by 2.4%, film, TV, radio and photography by 3% and museums, galleries and libraries by 1.9%.

The Creative Industries now make up 5.8% of the UK economy.

CreaTech is a much smaller element of the economy but is widely recognized as a key area for future growth.

[7] https://www.creativeindustriesfederation.com/statistics

[8] DCMS, 2020b

In absolute terms, the number of advertised CreaTech jobs have increased over the last three years by 16% versus a 3.3% increase over the same period in the UK labour market as a whole.[9]

CreaTech companies have seen steady growth in private sector investment. In 2017 £499m was raised, increasing by 50% in 2018 to £759mn and reaching £981.8mn in 2020.[10] This makes the UK third in the world for CreaTech VC investment, just behind the US and China. CreaTech investment constituted over 9% of total tech sector investment in 2020, compared to 6% in the US and China. CreaTech companies raised more than Energy tech in 2020, with just under £1bn, compared to Energy tech's £846m.

The Significance of this Sector for Regional Economies

The Creative Industries play a key role in economic development at both regional and national levels (Evans, 2009). Not only do these industries directly contribute to employment and GVA, but they also generate a number of spill-over benefits that make them significant to regional development.

For example, these industries are often deeply embedded in local supply chains through the provision of B2B services. They can support cultural consumption, increasing tourism spending.

Innovation spill-overs are significant too. Creative Industries are one of the most innovative sectors of the economy (Müller et al., 2009) and can drive innovation in other sectors. They do this both directly through design and soft innovation (Stoneman, 2010) and indirectly by developing new services and business models and by combining technologies in novel ways, which can be replicated or expanded upon in other sectors (Miles & Green, 2008).

For these reasons the Creative Industries are widely regarded as playing a key role in maintaining robust regional innovation ecosystems (Cooke & De Propris, 2011).

However, the economic geography of the UK Creative Industries is not uniform, with London and to a lesser extent, the South East accounting for the majority of Creative Industries productivity[11].

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[9] Tech Nation CT Report

[10] ***Tech Nation, Pitchbook, 2021***

[11] London contributed 52% of creative industries GVA and the South East contributed 17% of creative industries GVA in 2018 (DCMS, 2020a)

Moreover, Creative Industry businesses tend to ‘cluster’ in particular places, often within large cities (Mateos-Garcia & Bakhshi, 2016). This phenomenon is not unique to the UK and can be found worldwide, as creative businesses typically rely on strong networks of suppliers, customers, collaborators and freelancers to innovate and grow. Due to this reliance on collaboration and competition networks, there is a tendency to view creative clusters as deeply linked to urbanisation (Scott, 2006).

The majority of research on creative clustering focuses on cities with relatively little attention paid to the potential of smaller towns and rural creative clusters (Bloom et al., 2020).

However, there is a slowly growing recognition of the role of towns and more rural geographies in supporting clusters of Creative Industry activity. For example, recent work from the national Creative Industries Policy & Evidence Centre (PEC)[12] shows a plethora of creative industries ‘micro-clusters’ in non-city areas across the UK.

Research from the PEC which assesses Creative Industry employment patterns from 1991-2018 finds many non-cities have relatively high creative employment growth rates. (Gardiner & Sunley, 2020). This suggests that the creative industries networks outside the UK’s main cities have the potential to be a major driver of regional growth.

In addition, studies that examine the links between tourism and the creative industries suggest that coastal tourist locations offer significant potential for broader creative industries development as the strong collaboration networks and interdependence in such places can form the basis of creative clusters (Romero-Padilla et al., 2016).

The ability of a thriving Creative Industry sector to drive regional economic innovation and growth is now reasonably well recognised. Many city regions and LEPs have the Creative Industries or Creative, Digital & Tech growth strategies, often significantly resourced and highly advanced[13]. And this is having an impact. In the West Midlands, for instance, Creative Industries grew its GVA by 46% between 2010 and 2018 (ref). The DCMS Creative Industries Clusters & Regions Group now has a specific remit to support regional Creative Industries growth as a key element in the UK Government’s “levelling-up” agenda.

[12] Siepel et al., 2020

[13] Give examples (bristol?)

The State of Play in Coastal West Sussex: What We Found

a) Data Collection: Standard Industry Classification codes

The numbers and types of businesses that operate within the Government's definition of the Creative Industries is calculated by asking businesses when they initially register or incorporate to choose from a list the category that best defines their economic activity. These categories are known as the Standard Industrial Classification of Economic Activities, (SIC Codes).

It is well recognised that this is an imperfect approach. There is no on-going incentive for businesses to ensure they are in the right category. If initial categories are wrongly chosen or the company pivots in a new direction, then SIC codes could be misrepresenting the sectors that such businesses undertake activity in.

When a detailed 'bottom-up' analysis of digital business categorisation was made as part of the Brighton Fuse research, results suggested that relying on SIC codes as a measure underestimated the number of businesses operating in the Creative Industries in the city by 30%[14]. Whilst Government has recognised this issue[15], it still impacts the data produced.

Additionally, SIC codes alone do not differentiate between the scale and size of businesses, and this can obscure crucial differences between seemingly comparable localities.

It is with those caveats that we present the following data.

b) The Creative Industries in Coast to Capital LEP

Research by the Smart Specialisation Hub[16] compared the Creative Industries presence in each of the UK's Local Enterprise Partnerships. Coast to Capital LEP, which includes the Coastal West Sussex region, is one of 8 LEPs that has more than

[14] http://www.brightonfuse.com/wp-content/uploads/2013/10/The-Brighton-Fuse-Final-Report.pdf

[15] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/203296/Classifying_and_Measuring_the_Creative_Industries_Consultation_Paper_April_2013-final.pdf

[16] Smart Specialisation Hub: Mapping the Creative Industries May 2016

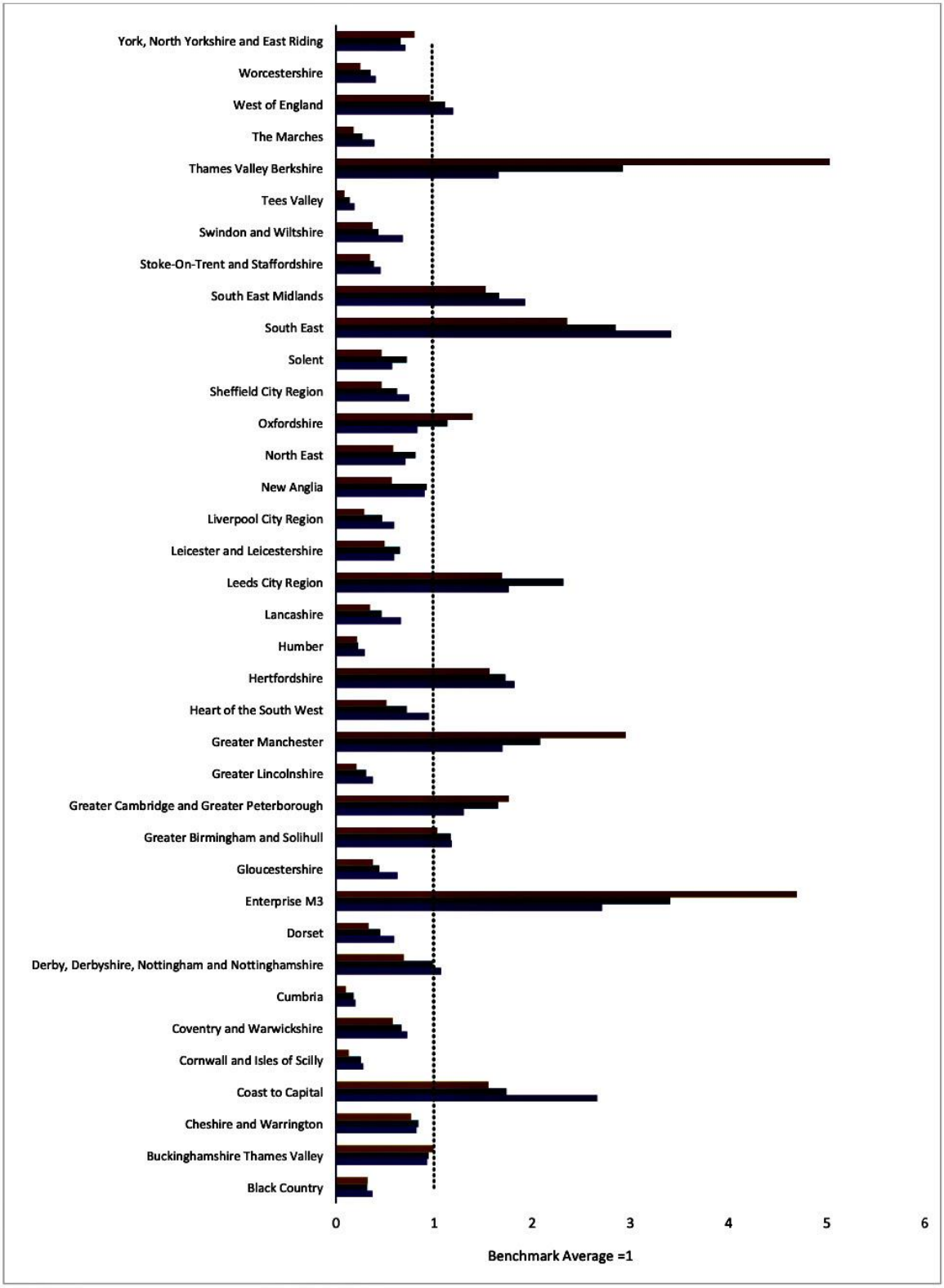
one Nesta designated creative cluster[17], of which there are 47 nationwide. Using that criterion, C2C LEP is in the top 21% of LEPs for creative industries presence[18]. The C2C LEP clusters are the Brighton & Hove and Chichester TTW areas.

This benchmarking chart from the same report suggests that C2C LEP has a significantly above average representation of Creative Industry firms. In common with the South East LEP, it is characterised by a large number of creative businesses that, in aggregate, do not deliver the level of turnover that the LEP's based around the M4 corridor and in Cambridge and Greater Manchester achieve.

[17] *Nesta (2016) The Geography of Creativity in the UK; ONS BSD (2016)*

[18] 4 LEPs have 2 clusters, 3 LEPs have 3 clusters, and one LEP (SELEP) has 8 clusters

Benchmarking the Creative Industries' Business, Employment and Turnover



Turnover Employment Businesses

Source: ONS (2017) Analysis of enterprises in districts of the UK for UK SIC 2007 classes in the Creative Industries; IDBR (2016)

c) The Creative Industries in Coastal West Sussex / Brighton & Hove

Official business register data[19] suggests that in March 2020 there were approximately 1,475 creative industry businesses[20] operating in the Coastal West Sussex (CWS) region, with an additional 2,985 creative industry businesses operating in Brighton and Hove (B&H). Table 1 below shows the number of Creative Industries businesses in the CWS area and in B&H, with a breakdown by Creative Industries sub-sector[21]. The data has also been broken down by local authority district within the CWS region[22].

[19] Source: National Statistics: UK Business Counts - local units by industry. Available at www.nomisweb.co.uk

[20] Business refers to local units. Local units are individual sites that belong to an Enterprise, so this metric captures companies who operate within the region, but who may have additional units based elsewhere.

[21] Creative industries businesses and creative industries subsectors are defined at SIC code level in line with DCMS definitions see (DCMS, 2016)

[22] Note, these local authority district breakdowns do not cover the whole local authority area, only the portions of the local authority area which are within CWS.

Table 1

Creative Industries businesses operating in the CWS area and Brighton & Hove 2020

Industry	Adur	Arun	Chichester	Worthing	Total CWS	Brighton and Hove
Advertising and marketing	20	30	30	25	105	260
Architecture	10	40	20	30	100	125
Crafts[23]	0	5	5	0	10	15
Design - Product, graphic and fashion design	20	45	55	30	150	270
Film, TV, video, radio and photography	35	35	75	40	185	485
IT, software and computer services	125	125	235	180	665	1,105
Museums, galleries and libraries	5	5	10	10	30	5
Music, performing and visual arts	25	40	45	40	150	595
Publishing	10	25	30	15	80	125
All Creative Industries Total	250	350	510	365	1,475	2,985

Across CWS, this dataset suggests Chichester and Worthing have a Creative Industries presence. In regards to the different subsectors of the Creative Industries, we find the majority of activity taking place in IT, software and computer services which accounts for 45% of all CI businesses and in Film, TV, video, radio and

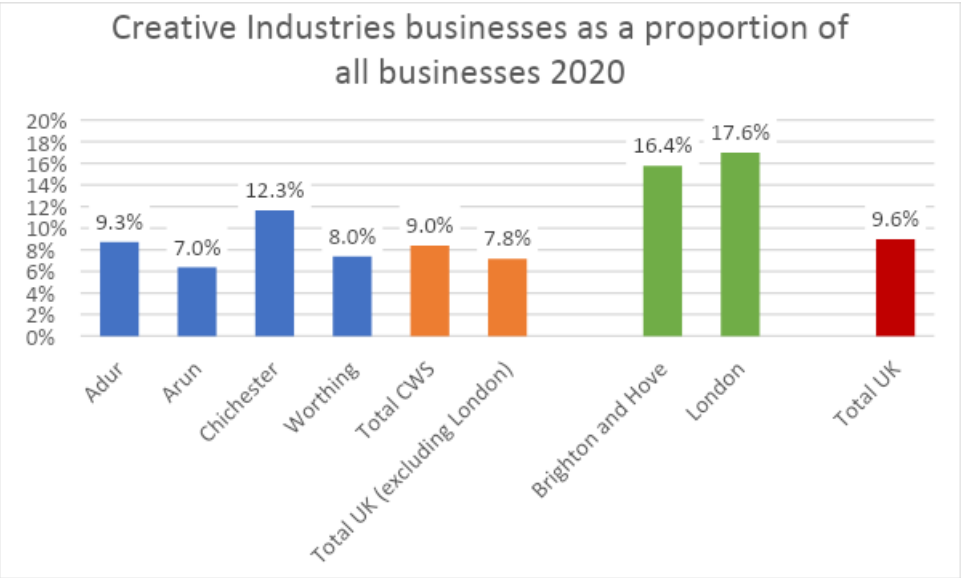
[23] It is important to note that both crafts and museums, galleries and libraries are particularly difficult to capture using ONS business count data and so these figures are likely to be drastically undercounted. Using web scraped data from the PECs Creative Radar project, a further 200 crafts businesses and a further 50 museums galleries and libraries were identified in the CWS region.

photography, which accounts for 13% of all creative businesses. If Brighton is included, music and performing arts become more significant.

d) Coastal West Sussex compared to the UK Average

This data can help establish a baseline from which to judge the impact of future policy interventions. To understand what these figures tell us about the potential of the area, it is helpful to compare these figures to the UK generally.

Figure 1 below shows Creative Industries businesses as a proportion of all businesses in CWS and B&H alongside the average proportion for London and the UK (both including and excluding London). The data suggests that the CWS area has a slightly lower than average proportion of Creative Industry businesses when compared to the total UK average (9.0% compared to 9.6%), but a higher proportion than the UK average when excluding London (9.0% compared to 7.8%). Brighton & Hove has a particularly high proportion of Creative Industries businesses at 16.4%.



When looking to compare the different Creative Industries sub-sectors (table 2 below), we see that, if we exclude London, the CWS region is above the UK average in almost all subsectors. The exception is the IT, software and computer services sub sector. This is largely because Arun has a far lower proportion of these types of businesses and Worthing a slightly lower than average proportion.

	Adur	Arun	Chichester	Worthing	Total CWS	Total UK (excluding London)	Brighton and Hove
Advertising and marketing	0.7%	0.6%	0.7%	0.5%	0.6%	0.6%	1.4%
Architecture	0.4%	0.8%	0.5%	0.7%	0.6%	0.5%	0.7%
Crafts	0.0%	0.1%	0.1%	0.0%	0.1%	0.0%	0.1%
Design - Product, graphic and fashion design	0.7%	0.9%	1.3%	0.7%	0.9%	0.6%	1.5%
Film, TV, video, radio and photography	1.3%	0.7%	1.8%	0.9%	1.1%	0.8%	2.7%
IT, software and computer services	4.7%	2.5%	5.6%	3.9%	4.0%	4.0%	6.1%
Museums, galleries and libraries	0.2%	0.1%	0.2%	0.2%	0.2%	0.1%	0.0%
Music, performing and visual arts	0.9%	0.8%	1.1%	0.9%	0.9%	0.8%	3.3%
Publishing	0.4%	0.5%	0.7%	0.3%	0.5%	0.3%	0.7%

e) Regional Growth Trajectories

Having established the official count of Creative Industry businesses currently operating in the CWS area, it is useful to gain a sense of how the CWS area has developed over time.

Table 3 below shows grow rates for Creative Industry businesses from 2016-2020, alongside some benchmark comparisons. The CWS area has seen growth of 10% in Creative Industries businesses over the past five years, exceeding the UK national average of 8%. Worthing shows the highest growth.

Table 3

Growth in Creative businesses 2016-2020

Adur	4%
Arun	9%
Chichester	6%
Worthing	16%
Total CWS	10%
Brighton and Hove	3%
Total UK	8%
Total UK (excluding London)	7%

Across subsectors, there is high growth in Film, TV, video, radio and photography for the CWS area, by 37% between 2016 and 2020 and strong growth in advertising and marketing of 17% across the same period. Conversely there appears to be relatively low growth in design and below average growth in the IT, software and computer services in the CWS area.

	Total CWS	Brighton & Hove	Total UK	Total UK (excluding London)
Advertising and marketing	17%	13%	7%	5%
Architecture	11%	19%	8%	8%
Design - Product, graphic and fashion design	3%	0%	7%	5%
Film, TV, video, radio and photography	37%	9%	9%	11%
IT, software and computer services	6%	0%	10%	8%
Music, performing and visual arts	11%	-1%	5%	4%
Publishing	-16%	9%	-1%	-2%

Creative clusters and micro-clusters in the CWS and Brighton & Hove area – Nesta, PEC and Wired Sussex data

In 2016, NESTA undertook an analysis of the UK's high intensity and high growth creative clusters using travel to work areas (TTWAs)[24]. Using this model both the Brighton Travel to Work Area (TTWA) and the Chichester and Bognor Regis TTWA were identified as significant creative clusters, but Worthing TTWA was not found to have a high enough concentration of creative businesses to consider it a creative cluster.

However, more recent data work undertaken for this report suggests two things. First, by aggregating Chichester and Bognor Regis in that NESTA research, the amount of impactful creative digital activity in Bognor Regis is overstated. This appears to be born out in the responses to our interviews, where it was suggested that creative digital activity in the town had reduced since 2016.

[24] Mateos-Garcia & Bakhshi, 2016

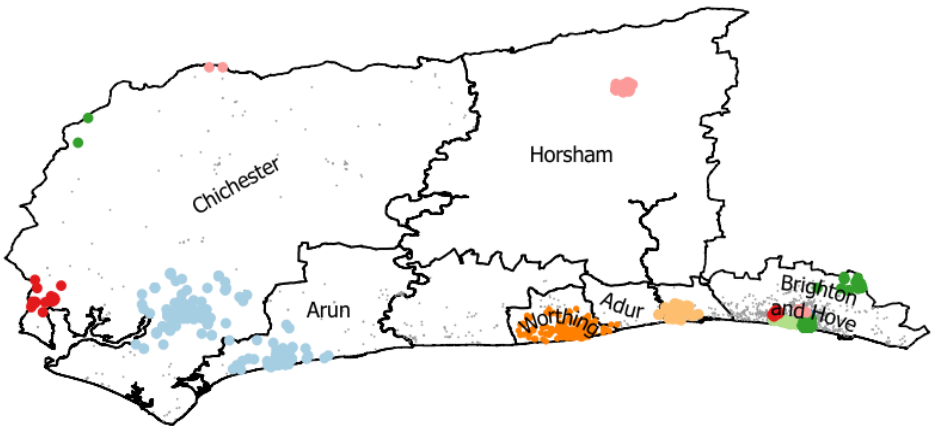
Secondly, our data also suggests that since 2016 creative digital activity in Worthing has grown significantly.

Figure 2 – Map of Travel to Work Areas (TTWAs)

Source: ONS. Available at https://ec.europa.eu/eurostat/cros/system/files/ttwa_in_uk.pdf

Recent work for the Creative Industries Policy and Evidence Centre (PEC) explores the clustering of creative industries firms at a finer geographical level than has been previously examined. This research uses web-scraped data to identify creative businesses, and utilises an algorithm to identify clusters of creative activity at postcode level.[25] In their research, six creative micro-clusters were identified in Brighton and Hove, two micro-clusters in Chichester and two further micro-clusters in the CWS area (see fig 2 below).

Figure 2 – Micro-clusters in the CWS and B&H area



[25] see Siepel et al., 2020 for full methodology

Using a combination of data from the PEC, the Wired Sussex membership database and our own desk research, and sense checking that with a series of 1-2-1 interviews, we have examined the micro-clusters in CWS in greater detail.

a) Chichester and Bognor Regis / Arun

This micro-cluster of creative businesses spans the southeast of Chichester and the area surrounding Bognor Regis. While the cluster has a large number of businesses across all creative sectors, it is characterised by an especially high concentration of film and TV production businesses. This ranges from award winning companies working with national and international broadcasters such as Big Wave Productions located in central Chichester to the solo producer/director ShortCut Productions in Bognor Regis. It includes a large number of corporate video service providers. Such companies in the cluster are supported by various auxiliary services including film equipment hire and filming and recording studios.

However, Chichester and Bognor Regis are two very different places. Grouping them together into one Creative Digital cluster runs the risk of making decisions that don't fit the needs of either place.

Chichester is a historic cathedral city with an active set of cultural institutions including Chichester Festival Theatre (CFT), Pallant House Gallery and the Novium Museum. CFT sees itself as having a social remit, having been established in the 1950s 'by the community, for the community'. Accelerated by the pandemic they are increasing their digital outlook, live streaming productions and hiring a new digital producer. Their space affords new opportunities for greater connection with the community which they are currently exploring. The skillsets of many of their employees, in particular the technical staff such as set designers, prop makers, wig and costume designers, crossover into film and TV and there are good connections with the local FE college to help build the talent pipeline for the future.

Rume2 is a new co-working space, established by a digital marketing veteran who spotted a gap in the market when she failed to find somewhere locally from which to work remotely. This space houses an eclectic mix of local businesses, remote workers and individuals, supported by an active group of networks including The Collective and The Design Collective, Last Friday Club and the local Chamber of Commerce. The space has proved that bringing people together serendipitously can lead to unusual creative collaborations.

The local creative industries tend to be design focused - architects, graphic designers etc. with little software development. The number of architects suggests

an opportunity for connection with Brighton's growing immersive industry as there are spill-over benefits in creating virtual versions of new builds.

The nature of the town hampers the development of some technical infrastructure. Phone reception is affected by the limitations on the height of phone masts set by the cathedral and fibre connections in the city centre require pedestrianised areas to be dug up, making the process slow and difficult.

Bognor Regis has had investment in the form of The Track co-working space and the new campus for Chichester University. In addition to building the creative digital sector in Bognor Regis through direct support for businesses, The Track will be engaging with key partners in the community to highlight opportunities in these sectors for graduates and young people. However, social problems remain a challenge to the further development of the creative digital sector. The lack of visible progress made in regenerating the town has led to disillusionment, with some interviewees believing the town has gone backwards. Further economic development activity aimed at the creative sector would need to work alongside changes to the fabric of the town to be believable and empowering.

b) Worthing

The Worthing creative industries micro-cluster is the fastest growing micro-cluster in the CWS region. It is relatively diverse in its sectoral make-up, but has a high concentration of web design and branding companies alongside a growing number of video production, visual effects and animation companies. The cluster also houses at least 6 recording studios, suggesting strong links with the wealth of musical talent across the CWS and B&H region.

The development of Worthing as a cluster has been happening over a number of years with established firms such as FreshEgg having been founded twenty years ago. There is a 'push' effect being created by the investments of the local authority in both digital connectivity through gigabit broadband infrastructure and social connectivity through the expansion of the Colonnade House gallery, co-working and makerspace. Alongside this the opportunity of bigger, more affordable housing has a 'pull' effect with people being drawn west from Brighton. This appears to have reached a tipping point with sufficient numbers of people having made the move to have invigorated the local scene and created a buzz that is likely to draw in more creative people and businesses.

The work of social enterprise AudioActive provides a useful prompt to consider the potential for unequal distribution of the benefits that a burgeoning creative sector may have. By setting up a hub for social innovation and music/talent development on Worthing's high street, they will be able to expand beyond the free music sessions

already offered to disadvantaged young people locally and create opportunities for a wider range of talent to access the creative industries over time.

Worthing is home to a range of successful networks connecting businesses and individuals within the creative sector. Worthing And Beyond, run by design agency Huxley is an online directory of creatives and the Instagram account Beyond Brighton promotes the work of local makers. Worthing Digital is a well-established community of 800+ locals with a common interest in all things digital, media and online. An opportunity exists to build bridges between these communities - something that Colonnade House and the AudioActive space might well support once their buildings are ready, and meeting is person becomes more possible once again.

c) Adur

The creative micro-cluster in Adur district is tightly located around Shoreham. The cluster is characterised by the strong presence of B2B services firms, including business consultancy, web design, SEO services, branding and database management companies. This cluster has seen high growth in IT, software and computer services business over the past five years. Businesses based in Shoreham have a tendency to label themselves as being in Brighton, and one might question whether the Shoreham micro-cluster is separate and distinct.

d) Brighton & Hove

When it comes to Creative Digital, it is Brighton that currently dominates the CWS sub-region. It has a growing international Creative Digital reputation, underpinned by a very dynamic entrepreneurial culture. A recent research report into the games sector[26] demonstrated that large international games studios have become embedded in the city by buying up locally built studios. Recent examples include Warner Games buying the TT studio and Fortnite publisher Epic buying Mediatonic. The city has a critical mass of students from the two universities which supports a lively and active cultural economy. Its Creative Digital activities are underpinned by a range of networking groups and organizations spanning arts and business. According to the micro-clusters research, it houses 6 separate creative micro-clusters. Its creative digital sector is still growing (by 3% pa) and acts in classic clustering style as a pole of attraction (e.g. Friday Media Group have recently moved their HQ into the city). It is a city brand that has a strong recognition factor, with many companies outside the city using their proximity to it as a selling point.

[26] Game On Report 2021

However, the cost of living and working in the city has grown significantly. Whilst the lack of affordable housing has the potential to inhibit its historical attraction to innovators and entrepreneurs at the early stages of their journeys, it appears that to date the most visible impact has been on mid-career individuals, with enough moving out of the city to have a noticeable and positive impact on Creative Digital activity in Worthing, for instance.

Summary of the clusters data

This analysis shows that there is indeed a substantial amount of creative industries activity across the CWS region. Whereas Brighton & Hove in the East and Chichester in the West are clearly hubs of creative and cultural activity, as a midpoint between these two cities Worthing is emerging as a strong creative micro-cluster in its own right.

These clusters and micro-clusters along the coastal strip could be characterised as a chain. The relationship between the 'ends' of that chain, Brighton & Hove and Bognor Regis, is practically non-existent. Instead, each place connects most strongly with the place next to it, with the strongest links being Brighton & Hove which benefits Worthing, and Chichester which benefits (or could benefit) Bognor Regis.

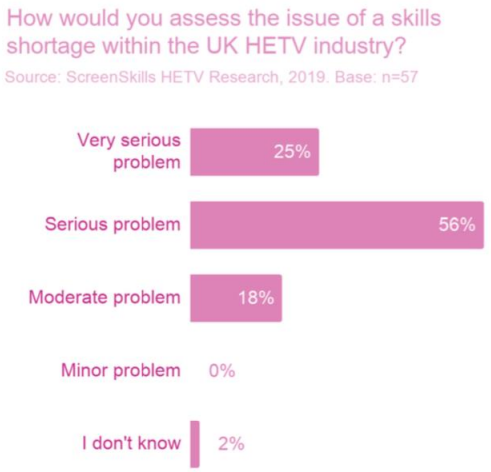
In the middle of the chain, the strength of Littlehampton's relationships are less clear. Some places are subsumed by others - those businesses based in Shoreham have a tendency to label themselves as being in Brighton, and indeed it's hard to characterise the Shoreham micro-cluster in a way that's separate and distinct. In the same way, Bognor's creatives are more likely to claim to be based in Chichester or local areas such as Felpham. The reasons behind this are different. Being associated with Brighton & Hove is judged to add a reputational benefit, adding creative cachet and 'brand recognition'. But Bognor Regis' reputation is judged to be sufficiently detrimental as to be denied as a location.

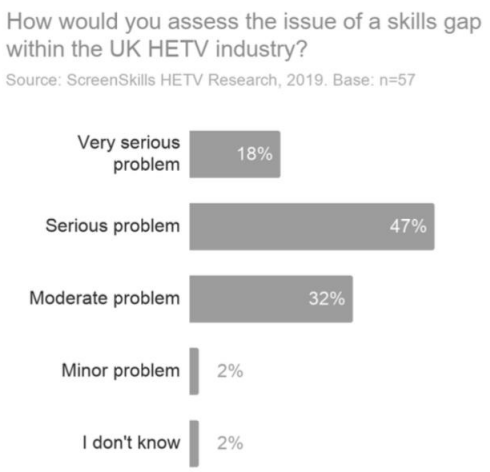
Moreover, much creative activity in Chichester can be seen to spill over into Bognor Regis, with creative businesses flowing along the coast. At the other end of the region, we see Shoreham emerging as a B2B digital services provider, potentially serving both B&H and the fast growing Worthing micro-cluster.

The Connection with Education and New Skills

It is clear that for a vibrant creative digital sector, there is a need for a strong connection with education and the development of a pipeline of talent. Many of the organisations contacted already have contacts with education providers and are willing to support students to enter the industry but there is still a shortage of digital

skill development in the area and a need for STEM and digital skills development[27]. The lack of skills in the industry is a national issue:





Attracting young people into the industry through education is a clear priority but whilst opportunities exist in regional higher education institutes, this is not mirrored across the region in schools and colleges. It is clear from our conversations with Schools that whilst the Brighton and Hove region has a high level of educational attainment, other more westerly areas of the coastal strip have a far lower level of attainment and opportunity.

The availability and extent of digital programmes is mixed and all schools and colleges cite barriers related to; cost of software, equipment and availability of staff with the requisite knowledge and experience. They would also like enhanced links to digital businesses and do recognise the opportunities for closer working relationships and the opportunities generated through creative digital activity beyond just STEM.

Conversations have been had with British Esports and the Association for Continuing Education in Esports (ACES/Chair Dr Richard Oddy), and as consultants for the first Esports L3 Qualification by Pearson and launching one of the UK's first Esports degrees (with more to come), the University of Chichester have specialist expertise in this sector and the relationship with education.

All consultees agreed the need for esports and gaming education, as an enrichment activity, qualification route and potential career path, was vital in developing a broad range of creative and tech skills needed across those sectors and others. Gaming and esports offers participants the opportunity to develop wide ranging and transferable skills, regardless of which industry they enter.

[27] STEM: The Case for Action The business case for investing in STEM skills in Coastal West Sussex Final Report May 2018

University of Chichester

One of the most significant creative industries and educational assets in CWS is the University of Chichester's Tech Park. Opened in 2018 to launch new creative digital tech, design and engineering programmes, the Creative Industries Department (CID) occupies approximately 50% of the building space. Creative based facilities include Sound Stage, Green Screen Stage, Recording Studio, 3D Animation & VFX studio, Games Design Lab, Mac Suites and a Gaming Centre for Esports.

Starting with 4 base undergraduate courses in 2017, the CID currently offers 12 undergraduate and 2 post graduate degrees alongside a new Creative Design Professional Degree Apprenticeship, for a 2022 intake. The aim of the new courses has been to identify the current and future creative industries career opportunities, tech skills in particular. There are signs of initial success with 90% of the first 3D Animation &VFX graduates securing high paid contracted employment at some of the UK's world leading specialist studios working across outputs for Film, HETV and Games.

The Tech Park creative facilities are also utilised commercially including recording scores, audio mixing and grading of a number of AAA Games and prime time TV Drama.

Secondary Education

There is a heavy focus on English and Maths Level 2 attainment within the UK education system. However, students who do not achieve a L2 qualification in both generally have limited higher qualification pathways to choose from. Undeniably it weakens the options students have to enter creative and tech courses.

Within the state school system Arts and Creative courses such as Media have been, and continue to be, withdrawn as options at GCSE level and therefore a significant pipeline for creative industries is being blocked. There has been much focus on STEM subjects and this has seen an increase in attainment in Mathematics, Biology, Chemistry and Physics in England, Wales and Northern Ireland, with increasing numbers of students achieving A* to C grades at GCSE.

The shift towards STEM overlooks the needs of many key sectors across the burgeoning Creative Industries. The Games Industry alongside Film & High End TV especially, are in great need of high skilled talent with a combination of creative and technology skills. This CreaTech gap will be very harmful to the Creative Industries growth and to the UK economic situation. It is a current problem that will only get worse.

Educational barriers lead to lack of opportunity for skills development and therefore narrowing options career wise. Teaching creative application of digital technologies

is a vital component if the creative industries are to continue growing at a rate of GDPR 5 times the overall UK economy.

In the Wired Sussex Game Sector report 2021, it identifies the securing of skills and talent as a key challenge.

However, though the Brighton and Hove region has a high level of educational attainment, other more westerly areas of the coastal strip have a far lower level of attainment and opportunity. In the coastal region it is a case of the 'haves' and the 'have nots' when the 'haves' don't really 'have'. Creative and technical skills development is hindered due to ageing and/or insufficient technology or no technology at all, which both limits and suppresses opportunity. Schools in particular struggle to provide enough time and resource for creative and technical classes, FE colleges offer a wider range of courses but also suffer from the uncertainty of budgets and funding decisions.

Both secondary and FE level institutions have highlighted a lack of access to expertise in terms of industry guests and visiting tutors as a real challenge. They would welcome more industrial input on a 'point of delivery' level. They also note that there appear to be insufficient jobs for those students that do engage with the subject areas.

If CWS are to improve the flow of talent from education to high skilled creative technology employment in the region's creative industries, then finding a way to give greater access and opportunity to engage for students is key.

Digital Infrastructure plans in CWS and Beyond

Ensuring there is infrastructure to enable an appropriate level of digital connectivity across the CWS / Brighton region is a key element in any Creative Digital strategy. C2C LEP's regional strategy provided an overall digital infrastructure vision but accommodated delivery through a range of different local solutions. There appears to be a collaborative approach at local and regional level, especially at county and district council level, that unifies those local activities.

To drive innovation, fuel economic impact and compete internationally requires future-ready accessible backhaul, resilience, and the availability of "regionally connected" dark fibre and duct infrastructure. Dark fibre and leased duct, backhauled to a local Internet Exchange, accessed by both public and private enterprises can support an effective innovation ecosystem.

Such a network would be capable of sustaining new digital sectors such as virtual production, e-gaming and e-sports etc.

West Sussex County Council, Mid Sussex District Council and Brighton & Hove City Council are working together, backed by Coast 2 Capital, DCMS and the MHCLG retained pooled business rates fund to deliver an open access dark fibre and duct network that connects two key regional economic hubs - Crawley and Brighton.

The current plan is to build on the Crawley to Brighton investment, linking this network to the wider coastal region thereby extending the reach of the dark fibre along the coast from Brighton, westwards towards Shoreham, Worthing, Littlehampton, Bognor Regis and Chichester. This will be high quality infrastructure that is scalable, cost effective, resilient, secure and crucially, allows for specific point to point connectivity for collaborative working. As the dark fibre network grows, it provides a real opportunity to connect test beds, innovation hubs, universities, research institutions and industry.

The Map below shows proposed CWS routes in red.

Conclusions: Connecting the Creative Coast

As detailed in the report, the towns that lie along the West Sussex coast contain businesses, networks and individuals who are adding significant economic value to the region through creative digital activity. The nature of that activity is diverse and includes an internationally significant games cluster, contributing to a sector that is denser and growing faster than the national average. It is a sector that delivers high paid, fulfilling work with a propensity towards innovation. It has the potential to generate spill-over benefits for adjacent business sectors and adds to the vibrancy and attractiveness of the area as a place to live.

It is a sector with enormous potential and deserves greater attention and investment than it currently enjoys.

To support the aspiration of our young people and generate a pipeline of talent it is imperative for schools and colleges especially, to enhance the nature of digital skills education provision. This is not just coding and programming but the creative application of digital technologies. Gaming and esports offers a route at grassroots level to embed these skills into everyday engagements. Gaming isn't just about developing young people with 'gaming' based skills. It provides the chance for young people to create logos, gain streaming experience, video editing and camera work, the gaming type activities will also expose students to a range of soft skills, such as communication and interpersonal, and events and marketing management experiences. This range of skills and abilities will provide a wider range of study and employment pathways that feed into many vibrant and growing sectors including not just Esports and Games Design but the Film and HETV, business, advertising and marketing sectors. It is also apparent that many students of college age are directly interested in film and music production and lack the opportunity to progress the skills they learn into the industry.

Online gaming is already a big part of many young people's social lives. Instead of hanging out in the park with their friends, like many of us would have experienced, theirs is a virtual park. They should be encouraged to 'play'. Engaging young people to like gaming is not the challenge. Making sure their natural digital talents are enhanced and they understand the professional career pathways that may be available to them, are both significant challenges.

Appendices

Appendix: Data sources and 1-2-1 interviewees

The report uses the following sources of data and information:

- 2019 Policy & Evidence Centre report into Greater Brighton Creative Industries (with data from original report updated with more recent data where available)
- Government Standard Industry Classification (SIC) Codes Database
- Online desk-based research
- Creative Industries Policy & Evidence Centre micro-cluster data (updated)
- Fame Business database
- Wired Sussex membership database
- CWS Survey responses (42)
- 1-2-1 interviews with key individuals including:
    - Jeremy Silver, CEO National Digital Catapult
    - Claire Halstead: Manager, Colonnade House
    - Adam Joolia: CEO AudioActive
    - Sarah Bazen, Digital Infrastructure Programme Manager, WSCC
    - Ciro Continisio: Head of Creator Advocacy at Unity
    - Adam Stafford: CEO Fresh Egg, Worthing
    - Victoria Hilditch: MD, Vinco & Love Bognor Regis campaign
    - Georgia Alston: Community Manager, The Track Bognor Regis
    - Sarah Cunliffe: Founder Big Wave TV, Chichester
    - Kathy Bourne: Executive Director Chichester Festival Theatre
    - Emma Smith: Head of Talent, Creative Assembly
    - Rosie Freshwater: Founder, Rume 2 Chichester

Appendix: Summary of responses to the 1-2-1 interview questions

How has being where you are helped or hindered you?

- **Reputational benefit from being in or near Brighton:** an added 'glimmer' for creatives. International name recognition can help with hiring creatives from overseas. Some say they are based 'near Brighton' to capitalise on reputation

- **Talent**: Being outside Brighton (in Worthing) helps FreshEgg recruit and retain digital talent - there's less competition and lower housing costs. But it's close enough for some staff to commute if they want to. However, the coastal catchment area is problematic - 180 degrees of people and then the sea. Big Wave find it hard to attract TV/Film talent to Chichester - are considering moving office to Brighton this year

- **Space**: Finding suitable office space in Worthing is difficult. Big new building by the station was snapped up by HMRC (space for 600). Empty retail space is unlikely to be suitable.

- **Housing**: Horsham has a severe lack of rental accommodation for relocating talent. Lower cost housing in Worthing is driving an influx of people into town. Both Worthing and Chichester are attracting buyers from London, pushing prices up.

- **Travel**: Lack of good connections across coast and up to London seen as problematic. Commuter drive times into Worthing puts potential new hires off. Horsham lacks direct train to coast, trains from Brighton to Chichester slow. Chichester trains don't run late enough for London theatre-goers to get home.

- **Reputational hazard:** Bognor businesses will claim to be in Chichester as Bognor has negative connotations. Run down state of town inhibits creative businesses from inviting clients to visit. "The social problems in Bognor need to be addressed if you want a sustainable modern economy." "A lot of people don't know where Horsham is. There's a perception of it being a sleepy little market town." can make it difficult to attract candidates.

Who is your business connected to in the local area?

- **Local Authorities**: Unsurprisingly those organisations with a social purpose are well supported by local councils. AudioActive has a strong relationship with Worthing & Adur council, with their business plan aligning with the council's corporate plan. Colonnade House is a council initiative, with public investment being made in the building works. As a major local employer Creative Assembly receives help and support from Horsham District council. Rume2 reported a positive relationship with WSCC who offered lots of connections, helped them get started. But other private businesses are unconnected to the LAs - and feel there is a lack of recognition of the value they generate.

- **FE colleges & universities**: many of the orgs are well connected to education providers, mostly to specific courses. Big Wave TV takes interns from Sussex Uni's Zoology course but would welcome more support to run apprenticeship schemes. CFT offers practical experience to students from Chichester College but regrets not having better connections with Chichester Uni's performing arts courses. AudioActive works closely with Northbrook College - a major reason for now working in Worthing

- **Arts Council:** major funder of CFT, Colonnade House and AudioActive have also participated in grant funded projects

- Creative networks: Rume2 have a reciprocal relationship with The Collective and The Design Collective, Last Friday Club and work with Pallant House Gallery. In Worthing Colonnade House is connected to Worthing And Beyond, an online directory of creatives run by design agency Huxley (ex-founder of Lick) and supports the Instagram profile Beyond Brighton.

- Business/sector networks: CFT partnering with other cultural orgs to host an informal City of Culture next year; Chichester Chamber of Commerce is important to Rume2, Worthing Chamber important to Colonnade Hse "creating profile for Worthing, promoting creative industries", Worthing Digital important to Colonnade Hse

What other connections are important to you?

- **National trade bodies:** Creative Assembly are members of UKIE, but

national rather than local focus

- **Ecosystem:** CA work with like-minded producers to promote diversity and other sector wide goals, Colonnade Hse sought support from Tech Resort Eastbourne to set up makerspace and train staff to use machines

- **Ancillary businesses**: Big Wave have moved their post production from facilities in Bristol to Brighton

- Local initiatives: Colonnade Hse linked to Worthing Town Centre Initiative (BID)

- Worthing & Adur District Council: Superfast fibre broadband being rolled out, along with infrastructure for 5G - quicker than expected. “There’s a couple of people in the Council really on top of that.”

Who do you support and who supports you?

- FreshEgg has a big network of freelancers they regularly work with. Provide recruitment services now so place freelancers within client organisations. CEO mentors 12 students at Worthing high school, introducing different employment options

- CFT ran a campaign to raise £100,000 pounds to provide 300 laptops for young carers across West Sussex to ensure that they had a direct link into their schools to be able to continue their education, and provide creative activity to do alongside that online. Build their digital output to attract audiences of tomorrow.

- Creative Assembly recognise the value of small studios so try to protect them. Have made a couple of acquisitions as part of the Sega group e.g. Two Point Studios in Farnham.”We thrive on competition and innovation and if you take that away, then we become stagnant.“ Sega is the parent company but largely leaves them be.

- Big Wave do a lot of work with the National Parks - linked to the type of shows they make (natural world, sea), part of a group with NGOs, Sussex Wildlife Trust campaigning against trawling. Have a big international sweep of broadcaster contacts that they work with.

- Majority of people AudioActive employ are freelance artists. Have been running a Young Leadership programme for the last 10 years - train to become music producers / artists / practitioners - become the next generation of their workforce.

- Personal networks: FreshEgg have a group of 6/7 other digital businesses they keep in touch with to stay up to date - co-working on some projects, make referrals that if we don't have the capacity to take on work, understand what's happening within recruitment, what the most difficult roles are to find, sense checking salaries etc.

How has Covid changed the way that you think about your location?

- At FreshEgg the move to flexible working is raising questions about the need for a big office. Not ready to give it up yet but thinking about its value. Life has changed. Until we're back properly it'd be hard to evaluate requirements of Office size - but creative activity works better in person

- Venues are predicting uplift in coworking/hot desking

- Many have seen staff move 'back home', to be nearer family. Questioning need to commute - with related season ticket costs.

- CFT - propelled into the digital world. Live streaming productions internationally "reaching areas of our community that we haven't reached before and actually reaching much further afield" t for it. Bolstered online learning education and participation. Have hired the first digital producer, alongside a digital marketing officer.

What do you think is missing in the local area?

- **Help to grow** - grants, operational support, marketing & community development etc: "Pretty much like the Wild West, we're all just trying to get by". Don't get much support at all. There's a lack of recognition that there's a really good media hub in the southeast, compared to emphasis put on the southwest. We should be recognised more.

- **Talent pipeline**: "I'd like it to be easier to take on apprentices, actually have more financial support to take on apprentices and develop them, but really the system is so difficult it's almost counterproductive. The best people we have are people that have come in at ground level and that we have trained. We

really like that pipe feed - there should be more that we can give them, give them easier access to apprenticeships. We as a company should have more support to encourage more apprenticeships as well."

- Affordable / suitable housing: young creatives aren't ready to buy - they prefer to rent but there's a lack of rentable accommodation in Horsham. Worthing is attracting 30+ creatives because of availability of houses with gardens compared

- Transport: Varying opinions on train service but coastal connections are generally judged to take too long, and trains to London don't run late enough. Horsham suffers from lack of direct connection to Brighton, linking 2 games hubs. A27 is universally viewed as problematic with driving times being affected by congestion, particularly during commuting times."Having driven over (from Worthing) to the Bognor campus the other day. It took ages. It's not a great drive, it's not a great train ride either. The facilities they've got are fantastic. But the idea that there's some kind of natural opportunity for collaboration there? I'm just not convinced,"

    - Infrastructure: In Chichester historic character of town affects ability to get fibre connection - in a pedestrianised area, needed to dig up paving. Phone reception is also uneven with restrictions placed on heights of phone masts by Cathedral.

- Diversity

- Awareness: Generally, society would benefit from finding out what game developers do. Massive misconception - "I don't think people see it as a legitimate business. They don't see it as a profession yet, rather a bunch of people with a hobby that struck it lucky. They don't see the value of it and I don't think that they see the outcome of the money that goes back into the economy. When you compare it to film or TV sales, the games sector is astronomical".

- Support from local MPs and other politicians to drive awareness, reputation, investment

Dream a little - what could and should this region be?

- Remember the forgotten spaces - smaller communities get ignored.

Struggle to retain their young people - even though it's where there's affordable housing.

- Always Possible did a mapping exercise for Brighton, 2-3 years ago, making maps of connections between different parts of the creative industries. It was called Bursting the Bubbles. There's a lot of resources gone into Brighton and they need to be more fairly distributed.

- "I'm not sure how much people that we work with think about Coastal West Sussex. They're working nationally, internationally, a lot of them, probably more connected to London than along the coast. It's a bit like the Greater Brighton thing, you know. I don't think anybody in Worthing really thinks like that. And in fact, Greater Brighton doesn't go down well as a title."

Appendix: Schools Contacted and Responding

- Cardinal Newman Catholic School
- Brighton Aldridge Community Academy
- Chichester Colleges Group
- St Oscar Romero Catholic School
- Hove Park School and 6th Form Centre
- Brighton & Hove 6th Form College
- Worthing College
- The Littlehampton Academy
- The Regis School

Appendix: Summary of School's Responses

How does your curriculum currently support the attainment of creative digital skills?

We currently offer both BTEC ICT and Computer Science at GCSE, and BTEC Single award and double award + Computer Science at A-Level. In regards to creative digital skills, the computer science course covers programming in Python at GCSE, whilst the A-Level course has more of a focus on LUA and using the Defold engine to create games. Our BTEC ICT courses cover a range of topics including programming for the double award and learning about and running their own social media pages for a project. – ***Cardinal Newman Catholic School***

In KS4 and KS5 we run a fairly comprehensive Filmmaking and Editing curriculum, including the planning and development of ideas for Filming Shorts based on available cast/locations. There are also Enrichment activities in this area offered at KS3, though these are in their infancy at present. At KS5 we also run curricula on Photoshop, VFX and Sound Design. –***Brighton Aldridge Community Academy***
We currently have a licensing agreement with Adobe and all students have access to the Creative suite software package. We also use the resources from Adobe training and incorporate this into the teaching and learner. –***Chichester College***

We have units of work in KS3 (video, leaflet creation, audio...) and he offer Cambridge Nationals in Creative iMedia. - ***St Oscar Romero Catholic School***

I head up the Computing Dept in the school, and in the 2 years since I arrived I have re-planned and restructured our offer to ensure all students are offered pathways in Computer Science, and Creative/ Digital Media right through from Y7 – Y13 (should they wish to take the subject in end of KS3 options). We also have a digital fluency objective running through both of these pathways. The school itself also has a digital strategy for 1:1 iPads so in theory students have access to the tech required to develop their creative digital skills. –***Hove Park School and Sixth Form Centre***

We run a level 3 Creative Media Production BTEC and have approximately 60 students in the first year (certificate) and 60 in the second year (diploma). Media and Film also have practical production coursework which involves making short films, music videos and magazines. We use Adobe Creative suite and have a n editing suite and recently a greenscreen room. –***Brighton & Hove Sixth Form College***

Students have the opportunity to engage in tutorials on a number of software programmes related to creative skills, from Adobe Premiere Pro and Photoshop to more advanced software like After Effects. They also utilise Wordpress blogs to collate their notes and independent work, and often use these blogs as an online portfolio for employers and universities to their work. –***Worthing College***
All students receive a Computer Science curriculum, which includes programming skills. We also offer Media Studies as an option at KS4 and KS5, including BTEC vocational award. The latter in particular is focused on creative digital media. –***The Littlehampton Academy***

Students learn to use photoshop only and not film making. So in terms of that it is a narrow focus. However they do learn the Pre-Production and planning for Moving Image. –***The Regis School***

Do you utilise computer gaming in the curriculum delivery or during enrichment activities? (This might be a BTech in Esports/qualifications in Games Design)

At the moment we utilise computer gaming by encouraging our 6th form students (Computer Science) to create a game for their project at A-level. We have looked at the Esports BTEC etc but have yet to make any decisions due to time constraints. - ***Cardinal Newman Catholic School, Hove***

Not at present, though I would be open to exploring this if we had the time/expertise to do so. –***Brighton Aldridge Community Academy***

We have just started the BTEC in Esports and have a games design programme run by the IT department. In the creative sector we have a Sound Design of Film and Computer Games programme. - ***Chichester College***

We have unit in KS3 and the units from Creative iMedia - ***St Oscar Romero Catholic School, Goring/Worthing***

Yes, currently we do R091 of the Creative iMedia spec which is a game design unit, for students in Y10. We prepare for this by combining coding and game design / making skills in Y7 with a Scratch game making unit, then we follow this in Y8 with some pixil art / data rep activities to make sprites for an imaginary game, which we then animate. In Y9 if students opt for CiM then do an initial 6 week scheme of learning, exploring the history of gaming 8 gen's of consoles, game genres, and elements that make games. In Y12 and Y13 the Digital Media course explores this in greater depth looking at pre-production processes, production and post production – looking more at roles within the industry and comparing independent companies with conglomorates… if you know anyone in the industry who would like to come in and meet with our students on this course, that would be very much appreciated…. :0) –***Hove Park School and Sixth Form Centre***

No, however we do have to teach computer games as part of Media A level but they don't have to make anything. –***Brighton & Hove Sixth Form College***

Videogames are part of the Media Studies A-Level and Digital Media courses but it's more of a textual study than a practical unit. –***Worthing College***
As above - BTEC Level 3 in Creative Digital Media Production. We also have a computing club which spends a lot of time programming games. - ***The Littlehampton Academy***
They do analyse some products for gaming in preparation for their media exam. We look at representation, narrative and stock characters. –***The Regis School***

Do you engage students in any video production, games design or computer animation activities? If so, how?

Game design not so much, but we start programming my Python in year 7 and we look at and create animations using both Adobe Flash and Fireworks in year 8. Video production is something that would be great to do, but the cost of equipment is a barrier to doing this. - ***Cardinal Newman Catholic School***

As mentioned, at KS4 and KS5 we do extensive video production, and are looking to expand this to include more opportunities to gain work experience on professional-level sets. –***Brighton Aldridge Community Academy***

We have media programmes from level 1 to 6 which include video production as well as a student lead production company that work with external clients. – ***Chichester College***
Yes in KS3 and KS4. - ***St Oscar Romero Catholic School***

Yes, as above. Other than the R091 unit students also do a unit exploring and making digital graphics, current project is designing a vinyl album cover. Y7 are making online safety videos after half term, storyboarding, collecting assets, prepping and editing – using iMovie on the iPads… In addition we run a competition every year for film making with a given theme, and I have just finally been able to restart our extra curricular activities which include: code club, game making, 3D design and printing, Minecraft Edu, and CyberDiscovery… –***Hove Park School and Sixth Form Centre***
As well as the above we also have an portfolio course called BHASVIC TV which runs weekly. These students make short films about a range of different things. This year we also want to try and involve some ESOL students with this. –***Brighton & Hove Sixth Form College***

Yes - in Film Studies, students have the chance to create their own film sequence (opening, ending etc.) in the 1st year and a 4min-5min based on an

exam board brief. In Digital Media, students undertake three units which involve video production - Unit 3 (short film), Unit 20 (audio visual advertisement) and Unit 23 (video portfolio). - ***Worthing College***

KS4 and KS5 Media students regularly produce videos; game design and computer animation occur in Computing, as well in extra-curricular opportunities from the Computing team. –***The Littlehampton Academy***
No. ***The Regis School***

What obstacles do you face in delivering or wanting to deliver across any of the above areas?

Money, time. - ***Cardinal Newman Catholic School***

Building networks of local industry professionals can be difficult - the ideal Tutors for our sessions (EG people early in their careers who have practical knowledge of current working practice, and can remember what it was like to be in school) are hard to find, and networking opportunities tend to focus on more 'office-based' connections. ***Brighton Aldridge Community Academy***

Initial investment in equipment is expensive –***Chichester College***
Mainly software prices and access to equipment for every student ***St Oscar Romero Catholic School***

Time, resources, people, being actually inside the school building with the students and having capacity to deliver sessions. –***Hove Park School and Sixth Form Centre***

We are pretty fortunate really. Adobe is sometimes a bit of a pain and whilst we have decent kit it is always in demand and we have to prioritise different group at different times. This is the same with our edit suite. ***Brighton & Hove Sixth Form College***

Practically demonstrating video games in a constructive way - ie showcasing gameplay. ***Worthing College***

Time (competing curriculum demands); cost; staff development and skills The ***Littlehampton Academy***

We have a narrow focus for the BTEC so creativity is limited to print and/or Pre-Production only. ***The Regis School***

Are you connected to any creative or digital industry partners across the region?

Legal and General have come in to speak to some of our female students taking ICT and Computer Science, that is it at the moment. ***Cardinal Newman Catholic School***

We have an extensive partnership 'list' of companies who have worked with us in the past, but in pandemic times we have not had much success in engaging anyone for actionable participation in work experience or mentoring. ***Brighton Aldridge Community Academy***

Not at the moment –***Chichester College***

No ***St Oscar Romero Catholic School***

Yes, have copied Dave in. He organises the network group for others with the same role as me in the region. Also linked in with Jane Waite from Barefoot, and with others from my previous roles in the city… Also, Apple and JTS as part of the Apple Education programme. ***Hove Park School and Sixth Form Centre***

No, but we would love to be. We do have different links with people who work in industry. We also really want to our students to be able to undertake some work experience in the creative industries, particularly BTEC students where the focus is much more vocational. ***Brighton & Hove Sixth Form College***

We are promoting a virtual talk with Ranald Lloyd-Williams from Feel Good Films (https://www.feelgoodfilmsco.com/) and developing links with the Dome cinema - had a positive conversation with them about future Film Club screenings and are looking to discuss an enrichment opportunity related to careers and industry, involving all our Media & Film students. ***Worthing College***

No ***The Littlehampton Academy***

No . ***The Regis School***

What would help your school strengthen the links with these sectors moving forward?

Communicating with us, otherwise it is hard to find who to talk to and which companies want to work with schools. Also offering our 6th formers

placements and support would be fantastic as a lot find it hard to find work experience. ***Cardinal Newman Catholic School***
Dedicated sessions linking to Practising Industry Professionals, notably those in Creative Fields and *especially* 'on-set' careers. ***Brighton Aldridge Community Academy***

We are open for well know companies to sponsor studio space or our production company in return for links to experts and cheaper equipment – ***Chichester College***

Yes we would welcome the partnership with this schools ***St Oscar Romero Catholic School***

Quality opportunities to work productively together, resources: human and physical and TIME –***Hove Park School and Sixth Form Centre***

Different project, industry professionals working with students or even giving feedback on their work. Enrichment and work experience opportunities. Students love hearing from people who work in industry and how they got to where they are and what their role involves. Also it would be great for students to visit institutions to see what they are like etc. ***Brighton & Hove Sixth Form College***

Directory of links; list of companies willing to engage and host visits - most we have historically contacted haven't bothered even responding. ***The Littlehampton Academy***
Change in qualification. ***The Regis School***

Dream big! What should regional development and support programmes do to enhance opportunity and skills development in the creative sectors for your students?

Paid spring/summer internships for our computer science and ICT students in the local area. Fund schools so that they can have the equipment to deliver video production lessons. Work with companies such as Adobe/Microsoft to offer schools free software as paying for these is a massive constraint on departmental budgets. Giving students an opportunity to work with these big and small tech companies to see what it's really like. Kids love the cyber security aspect of Computer Science so hacking days where they can do hacking simulations and learn how to prevent these would be great. Trips to Google and places like Microsoft/Xbox in Reading or other gaming developers in the region. Guest speakers to classes from the tech

industry, where they don't just talk to the kids but actually give them something to do. Give our poorer and disadvantaged students laptops and free creative software so they can practise at home and not just on school machines. Provide mentoring for our high achievers but all for those disadvantaged students so that they can help reach their goals, alongside the school / college. ***Cardinal Newman Catholic School***

I was previously able to develop and execute a Feature-length film production at my school in Steyning by working with Industry partners from my school in London - the film recently went to Netflix. I'd love to have some support in replicating the same experience here. ***Brighton Aldridge Community Academy***

Links with industry and the expertise in it. –***Chichester College***

Clubs for them, Courses, webinar, extra qualifications ***St Oscar Romero Catholic School***

Opportunities for hack style events, like the robotics day stuff we do or the Science Big Bang days. out of school students getting together with professionals and other kids to have time to really get involved in something inspirational… I had a student teacher a few years back and him and I started to explore VR tech for schools, but didn't get it to a point of being able to deliver more, but that would be good, combined with some workshops using Unity (I'm not too good at it) or Blender or those kind of things… I've been round visiting Uni courses over the last few years and seeing the kit and the rooms and the courses they offer not only makes me want to go back to Uni and take part, but also makes me realise how poorly funded schools are and how old a lot of our kit and ideas are, technology and gaming / digital tech moves fast but it's hard to keep up when you are in school with very few opportunities to develop your own skills – and time again also a bit issue… maybe competitions with prizes of kit or software or lessons or visits? Also be good to have people in school to showcase skills, talk about their job roles etc…. –***Hove Park School and Sixth Form Centre***

Joint projects with other institutions/industry. Speakers from industry. Work experience opportunities, offer real creative briefs. Up to date information about the creative industries in terms of how many people are employed in different sectors/industries, where there are skill shortages etc. Giving students networking advice and opportunities. Competitions! ***Brighton & Hove Sixth Form College***

The cost of speakers is often an issue, so more access to industry professionals would be beneficial. ***Worthing College***

Staff learning and professional development opportunities. Funding available to purchase new equipment - e.g. through sponsorship or partnership. Most of our Macs for video editing are more than 10 years old, and too expensive to be able to replace. ***The Littlehampton Academy***

Allow students the opportunity in participate in programmes that will allow them experience/work placements. . ***The Regis School***