

Exploring the role of
arts and culture in the
creative industries

Report
June 2017

Arts Council England

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Contents

1	Introduction	1
1.1	Aims of the study	1
1.2	Areas for exploration	1
1.3	Scope of the study	1
1.4	Structure of the report	2
2	Context	3
2.1	Introduction	3
2.2	The economic contribution of creative industries and the cultural sector	3
2.3	Methodological approaches to understanding the role of arts and culture in the creative industries	5
2.4	Conclusions	8
3	Case Study 1: Artistic and commercial practices – Director-Inventor-Entrepreneur: Dave Lynch	9
3.1	Introduction	9
3.2	History.....	9
3.3	Current artistic and commercial practice	11
3.4	The future	11
3.5	Conclusions.....	11
4	Case Study 2: The Arts in Gaming – Auroch Digital	13
4.1	Introduction	13
4.2	History.....	14
4.3	Current practice	14
4.4	Future	15
4.5	Conclusions.....	15
5	Case study 3: Music, adverts, trailers, TV and film – Harry Lightfoot, composer/musician ...	16
5.1	Introduction	16
5.2	History.....	16
5.3	Current practice	17
5.4	The future	18
5.5	Conclusions.....	18

6	Case Study 4: Interaction Designer, Creative Director, Lecturer and Artist – Joel Gethin Lewis	19
	6.1 Introduction	19
	6.2 History	19
	6.3 Current practice	20
	6.4 Conclusions	22
7	Case Study 5: Architecture and the Visual Arts – Hawkins\Brown	23
	Introduction	23
	History	23
	Current practice	23
	Future	25
	Conclusions	26
8	Conclusions and reflections	27

Tables

Table 1: Sub-sectors in arts and culture sector and creative industries sector	2
Table 2: Number of enterprises in the Creative Industries and Cultural Sector: 2008 – 2014	3
Table 3: Size of enterprises in Creative Industries and Cultural Sector by employment band (row %): 2014	3
Table 4: GVA contribution of Creative Industries and Cultural Sector: 2010 - 2015	4
Table 5: Exports of services by Creative Industries and Cultural Sector: 2010 to 2014	4
Table 6: Imports of services by Creative Industries and Cultural Sector: 2013 to 2014	4
Table 7: Exports of services by continent: 2014	5
Table 8: Imports of services by continent: 2014	5

1 Introduction

Arts Council England commissioned SDG Economic Development to produce a short, sector-facing report based on the findings from five case studies exploring the role of arts and culture in the creative industries and drawing on **existing data and research on the relationship between the two sectors**. The work was carried out in March, April, and May 2017.

1.1 Aims of the study

Arts Council England's commissioned this study to enrich its understanding of the different ways that the arts and cultural sector supports the functioning and growth of the creative industries. The findings will inform the development of the Arts Council's next 10-year strategy and its inputs into the work to take forward the Government's Industrial Strategy.

1.2 Areas for exploration

The brief for the study suggested several ways that arts and culture – not just publicly funded arts and culture – might support growth in the creative industries, including:

- The role of the arts and culture sector, or an arts and culture organisation, as a consumer of the outputs of the creative industries sector or businesses in the creative industries sector;
- The role of the arts and culture sector, or an arts and culture organisation, as a producer of inputs to the creative industries sector or businesses in the creative industries sector;
- The two-way movement of individuals/talent between the two sectors;
- The arts and culture qualifications, training and skills of those employed in the creative industries sector; and
- Partnerships and collaborations between organisations operating in the two sectors.

These research themes informed the development of the case studies.

1.3 Scope of the study

The brief indicated that one case study should be drawn from each of the Arts Council England's five regions (London, Midlands, North, South East, South West England). It also required the research to use the definitions of the two sectors used by the Department of Culture Media & Sport (DCMS).¹

Table 1 sets out the nine sub-sectors of arts and culture and the nine creative-industry sub-sectors as defined by DCMS. There is some overlap between the sub-sectors in the two sectors. In consultations with Arts Council England, it was agreed that the five case studies should focus on relationships between organisations and individuals operating in the nine arts and culture sub-sectors in the left-hand column and organisations and individuals operating in the five creative industries sub-sectors highlighted in **bold** in the right-hand column – to avoid the potential criticism that the case studies discussed relationships within the arts and culture sector rather than relationships between the two sectors.

¹ Department for Culture, Media and Sport, 2016, Economic estimates of DCMS sectors Methodology:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/578932/DCMS_Sectors_Economic_Estimates_-_Methodology.pdf

Table 1: Sub-sectors in arts and culture sector and creative industries sector

Arts and culture sector	Creative industries sector
Arts	<i>Advertising and marketing</i>
Film, TV and Music	<i>Architecture</i>
Radio	Crafts
Photography	<i>Design: product, graphic and fashion design</i>
Crafts	Film, TV, video, radio and photography
Museums and Galleries	<i>IT, software and computer services</i>
Library and archives	<i>Publishing</i>
Cultural education	Museums, galleries and libraries
Heritage	Music, performing and visual arts

Source: SDG Economic Development

1.4 Structure of the report

The report has the following chapters:

- Chapter 2: Context – highlighting recent research on the creative industries and the cultural sector and recent data from DCMS on the economic contribution of the two sectors.
- Chapter 3: Case Study 1: Artistic and commercial practices – artist-inventor-entrepreneur Dave Lynch, North of England
- Chapter 4: Case Study 2: The arts in gaming – Auroch Digital, South West England
- Chapter 5: Case Study 3: Music, adverts, trailers, TV and film – Harry Lightfoot, composer/musician, Midlands
- Chapter 6: Case Study 4: Interaction Designer, Creative Director, Lecturer and Artist – Joel Gethin Lewis, South East
- Chapter 7: Case Study 5: Architecture and the visual arts – Hawkins\Brown, London (and the North)
- Chapter 8: Conclusions and reflections

2 Context

2.1 Introduction

This chapter provides contextual information on arts and culture and creative industries as an introduction to some of the themes explored in the case studies. It looks at:

- The economic contribution of the creative industries and the cultural sector, to introduce their importance to the UK economy; and
- Methodological approaches to understanding the relationship between the creative industries and the arts and cultural sector.

2.2 The economic contribution of creative industries and the cultural sector

This section uses the Department of Culture Media and Sports Sector estimates published in 2016 to provide a snapshot of the economic contribution of the creative industries and the cultural sector. The snapshot seeks to provide an indication of the make-up and the economic importance of arts and culture and the creative industries by highlighting data on:

- The number and size of enterprises;
- Gross Value Added (GVA); and
- International trade (Imports and Exports).

Number and size of enterprises

The two sectors account for a significant proportion of all enterprises in the UK: the Cultural Sector provided 3.1% of all UK firms in 2014 and the Creative Industries accounted for 12% of all UK firms (Table 2). In 2014, almost 9 out of 10 enterprises in both sectors were micro-businesses, employing fewer than 5 people. Fewer than 1 in 20 enterprises employ 10-49 workers, and only 1% employ more than 50 people (Table 3).

Table 2: Number of enterprises in the Creative Industries and Cultural Sector: 2008 – 2014

Sector	Number of enterprises 000s							% change since 2008	% of UK firms 2014
	2008	2009	2010	2011	2012	2013	2014		
Creative Industries	186.7	188.9	193.8	206.7	219.3	236.1	248.8	33.2	12.0
Cultural Sector	60.0	59.4	59.0	60.3	61.9	64.2	65.5	9.1	3.1

Source: DCMS Sectors Economic Estimates, August 2016, p. 16

Table 3: Size of enterprises in Creative Industries and Cultural Sector by employment band (row %): 2014

Sector	Enterprise size by employment band (%)					
	0-4	5-9	10-49	50-249	250+	Total
Creative Industries	89.0	5.7	4.4	0.8	0.2	100
Cultural Sector	89.5	5.7	3.9	0.8	0.2	100

Source: DCMS Sectors Economic Estimates, August 2016, p. 17

Gross Value Added (GVA) contribution

In 2015 the creative industries accounted for over 5% of the UK's GVA. GVA growth for the creative industries and the cultural sector between 2010 and 2015 outstripped the UK average, which was just 17.4% (Table 4).

Table 4: GVA contribution of Creative Industries and Cultural Sector: 2010 - 2015

Sector	GVA £bn						% change since 2010	% of UK GVA 2015
	2010	2011	2012	2013	2014	2015		
Creative Industries	65.2	69.4	73.0	77.9	81.6	87.4	34.0	5.3
Cultural Sector	20.3	21.0	21.8	23.5	23.5	27.0	33.0	1.6
All UK	1,414.6	1,452.1	1495.6	1,551.6	1,624.3	1,661.1	17.4	

Source: DCMS Sectors Economic Estimates, August 2016, p. 7

Trade data

In 2014 the creative industries accounted for just under 10% of all UK exports, and the growth they achieved between 2010 and 2014 out-paced the UK average of 25.6% (Table 5).

Table 5: Exports of services by Creative Industries and Cultural Sector: 2010 to 2014

Sector	Exports of services £bn					% change since 2010	% of UK total 2014
	2010	2011	2012	2013	2014		
Creative Industries	14.7	15.5	17.3	17.9	19.8	34.6	9.1
Cultural Sector	5.1	4.6	4.9	4.8	5.4	6.8	2.5

Source: DCMS Sectors Economic Estimates, August 2016, p. 10

In 2014 the value of exports achieved by the creative industries (£19.8bn) and the cultural sector (£5.4bn) exceeded the value of their imports (£ 8.7bn and £4.9bn respectively) – Table 5 and Table 6.

Table 6: Imports of services by Creative Industries and Cultural Sector: 2013 to 2014

Sector	Imports of services £bn		% change since 2013	% of UK total 2014
	2013	2014		
Creative Industries	7.9	8.7	9.7	6.6
Cultural Sector	2.4	2.5	4.9	1.9

Source: DCMS Sectors Economic Estimates, August 2016, p. 14

Data on where the creative industries and the cultural sector export to, and import from, show Europe as the prime market in 2014, followed by America, then Asia, with exports to Africa and Australasia at much lower levels (Table 7 and Table 8). This pattern of trade suggests there may be some potential threats to exports and supplies – related to Brexit – but also opportunities to build relationships in fast-growing markets in Asia and Africa.

Table 7: Exports of services by continent: 2014

Sector	Exports of services £m					
	Africa	America	Asia	Australasia	Europe	World
Creative Industries	407	5,526	2,039	356	11,356	19,809
Cultural Sector	150	1,648	396	111	3,059	5,401

Source: DCMS Sectors Economic Estimates, August 2016, p. 12

Table 8: Imports of services by continent: 2014

Sector	Imports of services £m					
	Africa	America	Asia	Australasia	Europe	World
Creative Industries	97	2,408	1,032	333	4,821	8,707
Cultural Sector	37	944	114	218	1,173	2,486

Source: DCMS Sectors Economic Estimates, August 2016, p. 14

2.3 Methodological approaches to understanding the role of arts and culture in the creative industries

There are a number of significant definitional and methodological issues to consider when studying the relationship between arts and culture and the creative industries, including:

- Structure or anatomy of the creative economy and creative occupations;
- Spillover effects between sectors; and
- Direct interactions between those operating in the two sectors.

Anatomy of the creative economy, industries and occupations

The Department for Culture, Media and Sport (DCMS) makes the following distinctions between creative economy, industries and occupations:²

- *Creative Economy* – covers the contribution of those who are in creative occupations outside the creative industries, as well as those employed in the creative industries.
- *Creative Industries* – are a subset of the creative economy that covers those working in the creative industries irrespective of their occupation, in other words, it covers people in non-creative roles, such as finance, as well as those working in creative roles.
- *Creative Occupations* – are a subset of the creative economy that includes those working in creative occupations, irrespective of the industry in which they work.

The case studies below include examples of organisations, businesses and individuals operating within and across these categories – in some instances, a single person, at different times and in different places, operates in creative and non-creative roles within the creative industries and within the arts and cultural space.

² DCMS, Creative Industries Economic Estimates, January 2016

The speed of the growth of the creative industries...depends upon an environment that encourages innovation and rewards enterprise...there is a vital need to ensure a pipeline of creative talent and original ideas for economic as well as cultural growth...³

In 2012, the European Commission opened a discussion on spillover effects (often referred to by economists as 'externalities') from arts, culture and creative industries on the economy and society. In response, Arts Council England (ACE), Arts Council of Ireland, European Centre for Creative Economy (ecce), European Cultural Foundation, European Creative Business Network (ECBN) and Creative England initiated and funded research on the evidence and causality of spillover effects from arts, culture and creative industries on the economy and society.

The Europe Cultural and Creative Spillovers European Research Partnership conducted a preliminary evidence review in 2015.⁴ The review identified the following types of spillovers:

- **Knowledge spillovers** – which include new ideas, innovations and processes developed within arts organisations and by artists and creative businesses that spill over into the wider economy and society without directly rewarding those who created them.
 - The review found evidence of knowledge spillovers at the level of individuals (skills and experience, often captured in the term 'human capital') and organisations, in the form of organisational knowledge and social capital.
- **Industry spillovers** – which are experienced in the 'vertical' value chain and in 'horizontal' cross-sector working, such as productivity gains and innovations that flow from the influence of dynamic creative industries, businesses, artists, arts organisations or artistic events.
 - The review found evidence of industry spillovers in the cross-fertilisation of ideas between organisations operating in different sectors, and in the rate of take-up and the application of new technologies.
- **Network spillovers** – which arise from the presence of a high density of arts and/or creative industries in a specific location (such as a games cluster or a cultural quarter in a town or city). The effects include the spread of tacit knowledge and deeper and broader labour markets (these positive externalities, are often referred to by economists and policy-makers as 'agglomeration effects').
 - The review found evidence of network spillovers in the development of social cohesion, often related to regeneration projects, the branding of a city or place, and the development of a creative milieu, out of which entrepreneurs develop new businesses.

While the preliminary evidence review looked at the impact of arts, culture and creative industries on the economy and society rather than the impact of interactions between arts and culture and the creative industries, the overall approach it suggests is useful in assisting

³ Creative Industries Federation and Arts Council England, *How public investment in arts contributes to growth in the creative industries*, 2015.

⁴ Tom Fleming Creative Consultancy, *Cultural and creative spillovers in Europe: Report on a preliminary evidence review*, October 2015

understanding of the relationship between the two sectors, particularly regarding knowledge and industry spillovers. Network spillovers, on the other hand, help to develop understanding of the effects of interactions between the two sectors and a given place.

Characterising the relationship between arts and culture and the creative industries

The raw materials of the creative industries, including the publicly supported arts, are talent and ideas.⁵

Public funding supports (some) arts and cultural activity and organisations as a public good, or as part of economic development or regeneration strategies, or as part of attempts to tackle inequality. Public funding can also support the development of individuals who move into the creative industries to work full-time or to work with the creative industries as suppliers of services or ideas; such funding can also help to nurture ideas that are of value to the creative industries. Some of these ideas will be freely available to all and some may be subject to copyright (see Box).

Copyright protects original expression, for example, in literary, dramatic, musical and artistic works. It comes into effect automatically and is generally for the benefit of the author/artist/creator to whom it assigns exclusive rights. It is subject to an originality test and, as such, it is concerned with the relationship between the creator and the work. Creative industries use copyright in their business model; often, this is done by acquiring rights from an author/artist/creator or their estate.

The process of generating value from intellectual property (IP) protected by copyright has been described thus:

The raw materials of IP in the creative industries are brought to market through a complex interaction of creative, technical, marketing, management and other processes. The transformative stage of the creative industries supply chain is immensely complex and often involves multiple sources of expertise. A theatre production may employ external freelancers and SMEs for a wide range of needs including technical, digital creative, marketing, administration, sourcing, design and craft making etc. The production of a film may be even more complex in the outsourcing of its production processes.

Source: Creative Industries Federation and Arts Council England, *How public investment in arts contributes to growth in the creative industries*, 2015. p.31

Thus, one of the more significant interactions between the arts and cultural sector and the creative industries, is that it acts as a source of IP from which firms in the creative industries can generate revenue. Some of the case studies below look at how the creative industries can either benefit from commissioning new IP or by acquiring the rights to existing IP.

⁵ Creative Industries Federation and Arts Council England, *How public investment in arts contributes to growth in the creative industries*, 2015.

2.4 Conclusions

The creative industries account for a significant and growing part of the UK economy: 12% of all UK firms, 5.3% of GVA, 9.1% of exports. The cultural sector accounts for 3.1% of all UK firms, 1.6% of GVA, and 2.5% of exports. The creative industries and the cultural sector both run a trade surplus with each of their regional trading partners.

Recent research shows that not only do both sectors have a positive impact on the wider economy via spillovers, but that the interactions between the two sectors, for example in the generation and exploitation of IP and the application of the skills of artists in the creative industries is important. The following five case studies explore different aspects of the relationships between the two sectors.

3 Case Study 1: Artistic and commercial practices – Director-Inventor-Entrepreneur: Dave Lynch

3.1 Introduction

Work in arts and culture and the creative industries is characterised by freelancing and collaboration.⁶ Individuals, often operating through loose networks, come together to work on a project, once the project is over, the team breaks up, and at some point in the future some or all its different members re-connect to work on new projects. In some circumstances, an individual may act as a commissioner, and in others as a lead contractor or a sub-contractor. Often the formal role that a person plays in a team matters less than the overarching role of collaborator. Furthermore, an individual's performance against the requirements of a specific contract can matter less than the trust and understanding built up between the different members of a network over time.

This case study draws on the experience of one artist, Dave Lynch,⁷ who has worked in and with different elements in the creative industries – including PR, advertising, marketing, and fashion – as well as working as a solo artist and as part of the Frozen Music Collective.

3.2 History

Dave Lynch is an artist-director-inventor who explores the interface between science and art. He studied at Leeds Metropolitan University in the late 1990s and early 2000s, and works with film, lasers, lighting, projection, and sound. In the early part of his career, Dave designed and operated projection shows for around 450 live performances and club nights. He has also produced over 100 music videos, documentaries and promotional films (including the installation for the video that launched of the Vauxhall Adam), and delivered over 30 large installations. His clients include the BBC, Vauxhall, Jimmy Choo, Taylors of Harrogate (Box 3-1), and The International Centre for Life in Newcastle (Box 3-2).

Dave's practice is influenced by the search for, and the taking of, risk – both in the process of making works of art and in the works themselves. His most ambitious artistic project to date is Project Nimbus, which reworks Eadweard Muybridge's original projection technology, from 1879, to use laser technology to project images on to clouds. As a work of art, the project was not aimed at, and was not made available to, commercial markets – the technology was not developed to aid branding in the sky, it was developed as part of a scheme to keep the sky free of branding.

Over time, Dave's artistic and commercial practices have informed each other.

⁶ Creative Industries Federation and Arts Council England, *How public investment in arts contributes to growth in the creative industries*, 2015, p.31.

⁷ <http://www.davelynch.net/>

Box 3-1: The Sound of Coffee for Taylor's of Harrogate

Finn Communications, working for Taylor's of Harrogate, commissioned The Frozen Music Collective, of which Dave is a member, along with collaborators, neuroscientist & musician Christophe De Bezenac, computer programmer Richard England, and musician Chris Sharkey, to develop an experience for journalists and industry insiders based on coffee's ability to stimulate the brain.

The team responded to a concept by Finn Communications, to see what music the brain makes whilst a person is drinking coffee, by devising an installation that used an electroencephalogram (EEG) device to map an individual's brain activity, the data generated by a person's brain activity were then translated into a graphical score, which was played live by jazz musicians.

The event demonstrates how artists can work with brands to generate experiences based on a shared interest in exploring the creative process.

It was reviewed by Vice magazine.⁸

Collaborators: Frozen Music Collective, Lumen, Laura Dee Mills.

Client: Finn Communications and Taylor's of Harrogate

Box 3-2: The Crystal Brain for The International Centre for Life, Newcastle

The International Centre for Life (ICfL) commissioned the Frozen Music Collective to produce an installation. The commission was part of a larger project to establish a new gallery, funded by a £650,000 grant from the Wellcome Trust. The installation received around 6% of the overall project funding.

Frozen Music Collective worked with the client's appointed designers and fabricators, KCA London and Paragon Creative, on the overall concept and on the architectural requirements of the installation. The collaboration between artists and design team commenced at the very beginning of the design process and the client at the International Centre for Life believes this early involvement added value to the overall project. The client reports that the collaboration between the artists, designers and architects resulted in an improved visitor experience, and ensured the gallery space accommodated the installation without the need for any subsequent – and potentially costly – alterations.

The installation, known as the Crystal Brain, is an artwork that represents the nature of neural networks. It uses EEG technology to control algorithmic synthesisers that use models of natural mechanisms, such as swarms, which are then projected so that they appear to be floating on hand-crafted powder glass screens.

Initial monitoring and evaluation findings carried out by the ICfL indicate that the installation is attracting, and is appreciated by, non-traditional visitors, thereby increasing the ICfL's visitor numbers and diversifying its audience.

The installation is to run from 2016 to 2023.

Collaborators: Dave Lynch, Christophe De Bezenac, Paul Miller, Griet Beyaert, Suzie Cross.

Client: The International Centre for Life

⁸ https://munchies.vice.com/en_us/article/why-a-cup-of-coffee-sounds-like-brian-eno

3.3 Current artistic and commercial practice

To date, Dave has worked as a freelancer, but collaboration is, and always has been, an essential part of his artistic and commercial practice. He works with a core group of around 10 collaborators and has a wider network of around 50 people – including artists, technicians, plus management and administrative support.

Dave's collaborations – with fellow artists and brands – are founded on a shared joy of risk. From a brand's perspective, the commissioning process involves taking risks, as the outcome is uncertain; and from the artist's perspective, risks are an inherent part of the creative process.

When deciding whether or not to work with a brand, Dave seeks to understand its motivations. To structure his conversations with brands, Dave draws on the work of marketing guru Simon Sinek (Box 3-3).⁹

Box 3-3: Understanding the what, how and why of a brand

Sinek focuses not on 'what' is to be sold, for example a mobile phone, or 'how' a product or service is made, such as with excellent design skills and precision engineering; instead, he focuses on 'why' a brand exists or a product or service is made. For example, the motivation behind the development of a given product or service may be to disrupt traditional markets; profit, in this framework, is an outcome, not a motivating force.

The added value, for firms, of working with an artist with shared values is that the work will not only reflect the brand's ethos, and resonate with existing customers but can be used to raise the brand's profile via social media, thereby attracting new customers who have not been engaged by traditional advertising and marketing techniques.

3.4 The future

After six years of working closely with brands on new, large scale works, Dave's next venture will solidify an approach to collaborative working for the benefit of other artists and businesses. Dave is working with creative producer Suzie Cross on a new business model which fully explores the potential of this fusion of arts and business and is in the process of confirming seed funding to conduct feasibility and further R&D across the sector. It will create the infrastructure for artists to collaborate with brands, developing strategies which allow projects to be created where the primary focus is the artwork, retaining its integrity, and that aligns the 'why' of brands and their social responsibilities, with that of the artists. Essentially, it will take the form of a label, similar to a record label, which would allow new work to be developed, as well as protecting and exhibiting artists and their back catalogues.

3.5 Conclusions

Artists take risks as part of their artistic practice, and businesses take risks as they develop and launch new brands, products and services. A shared understanding of the importance of taking risks provides a basis on which artists and businesses in the creative industries can work together on the development of, and/or the launch of, new brands, products, and services.

Artists can add value to design and architectural projects, such as new galleries. This case study indicates most value is added if artists are involved at an early stage in the development

⁹ Simon Sinek, *Start With Why: How Great Leaders Inspire Everyone to Take Action*, 2009.

process, for example, because they can ensure installations and exhibits are not compromised by the restrictions of space and that costly alterations to buildings are not subsequently required to meet the needs of an installation.

Artistic practice can add value to commercial activity in the creative industries, for example, by applying innovative creative techniques and deploying new technology to product launches, or installations at events and festivals.

This case study demonstrates how artistic and commercial practices interact with each other to generate new ideas that benefit artists and businesses operating in the creative industries. It also shows how insights from marketing can aid artists to engage brands by identifying 'why' these brands exist, rather than focusing on 'what' they produce or 'how' they produce it, and linking the 'why' of the brand to the 'why' of their work.

4 Case Study 2: The Arts in Gaming – Auroch Digital

4.1 Introduction

The games sector is characterised by a few large companies, many small, often one-person, businesses, and a few medium-sized enterprises, such as Auroch Digital,¹⁰ the focus of this case study.

Box 4-1: Basic information about the Games sector

- There are over 2,000 active games companies in the UK, serving both domestic and overseas markets¹¹
- IT, software development and digital games account for around 50% of the creative industries' contribution to UK GVA¹²
- Consumer spending on games in 2016 was valued at £4.33bn (1.2% higher than in 2015)¹³

The games sector has developed several clusters in the UK.¹⁴ These clusters have formed because:

- ideas and partnership working are vital elements of a thriving games sector and proximity to likeminded firms and individuals eases the process of sharing ideas and developing partnerships
- individuals tend to prefer to locate in labour markets that offer a range of career development opportunities, and firms prefer to locate where there is a ready pool of skills on which to draw; these twin drives create a positive feedback loop that helps create a cluster
- firms in the games sector require an ecosystem of specialist subcontractors and suppliers, including, artists, writers, musicians, sound engineers, and programmers, as well as financial and legal advisors. The collocation of games companies therefore generates demand for freelance artists, while the existence of a pool of freelance artists assists small games firms to grow.

This case study looks at how the arts and culture sector supports the development of the games sector by supplying ideas and skilled workers; it also looks at how the games sector helps to support a wider arts and culture ecosystem.

¹⁰ <http://www.aurochdigital.com/#what-we-do>

¹¹ <https://gamesmap.uk/#/companies>

¹² Creative Industries Federation and Arts Council England, *How public investment in arts contributes to growth in the creative industries*, 2015, p. 9.

¹³ <https://ukie.org.uk/research>

¹⁴ <https://gamesmap.uk/#/companies>

4.2 History

Auroch Digital was founded in Bristol in 2010. Initially, it provided consultancy services to help organisations understand the business of games and gaming. In 2012, it became a development studio, creating original games, working in partnership with other games companies and major brands to develop titles, and carrying out work-for-hire projects.

The firm's back catalogue includes, 'Narco Guerra', 'Jack the Ripper: Shadow over Whitechapel', and the card game 'Elections of US America Election', which was Auroch Digital's first foray into the world of physical games.

The company founders, Tomas and Deborah Rawlings, helped develop the games cluster in Bristol through their work to establish the Bristol Games Hub (Box 4-2).

Box 4-2: Bristol Games Hub

The Bristol Games Hub is a not-for-profit organisation that provides space where games development companies, freelancers and academics come together to create and study games. It fosters a spirit of openness, generosity and collaboration among users.

The Hub supports independent studios, new start-ups, and students by providing affordable office space, shared resources, expertise, experience and best practise, in order to develop new 'stars' in game development.

Funds raised by the Hub are reinvested in the space to support residents and the wider games community of the South West.

4.3 Current practice

The development process and the search for ideas

New ideas are vital to company growth. Auroch Digital tends to have around four ideas in development at any given time. These developments are a mix of in-house ideas and ideas that are being developed in partnership with others.

The firm seeks out ideas from a number of different sources, for example, producers of board games. One important source of ideas is Fiction. Staff attend book fairs, such as the London Book Fair, in search of original material that might be developed into a game. After a story, character or series has been identified as a potential inspiration for a new game, relationships are developed with publishers, agents, authors (or the custodians of an author's estate), in order to secure the rights to the material. Once the rights have been secured the development process takes around 12 months. The development process may involve writers, in the development of narrative or to supply dialogue, but often the in-house team produces these for the game.

Staffing and the search for talent

Auroch Digital currently employs 15 members of staff. The staff perform a range of roles, including that of producer, director, programmer, designer, community manager and tester, and office manager. Most of the company's staff graduated from art college, having taken degrees with a technology focus – for games makers, the technology is the medium.

Recruiting and retaining the right people with the right skills is a challenge for the sector. As well as seeking creative graduates with strong visual skills, the firm seeks people with technical skills and practical experience of relevant software packages; 3D modelling and animation are

essential requirements for many of the roles. However, more traditional art qualifications can also prove useful; one current member of staff, who specialises in developing user interfaces, is studying for a Fine Art degree to improve his drawing skills.

As well as employing around 15 permanent members of staff, the business also works with a group of regular collaborators and subcontractors who provide a range of skills and expertise, including programming, audio design, artistic and visual input, and project management. These collaborators tend either to provide extra capacity to supplement in-house skills or to supply specialist knowledge and skills that a small company, such as Auroch Digital, needs at a given point in the development process, rather than as a continuous requirement. An example of the latter requirement is sound design, which is a specialist area, but is required only for around one month of a 12-month development process. Auroch Digital, like many games companies, works with sound designers who are trained musicians, a clear example of the arts adding value to the creative industries. The income artists receive from the games sector also helps sustain the health of the wider arts and music scene, as it allows artists to diversify their income sources. So, there is a two-way, mutually beneficial relationship.

It should be noted that where subcontractors are used to add to in-house capacity, there is always an opportunity for them to be recruited as permanent members of staff – a subcontractor programmer had recently been recruited as a full-time member of staff at the time this case study was developed.

4.4 Future

At the time of writing, Auroch Digital was actively involved in discussions for new projects related to existing intellectual property. The firm was also in the process of developing links with local colleges, with the intention of offering opportunities for students to gain experience of working in the games sector and of enabling the company to identify up-and-coming talent for the future.

4.5 Conclusions

The games sector makes a major contribution to the UK economy – serving both domestic and international markets.

The ideas and inspiration for games often come from the arts, for example, from Fiction. And games companies seek the rights to the intellectual property produced by the arts, in order to generate income. This process generates income for artists – or artists' estates – as well as for the creative industries; thereby establishing a mutually beneficial economic relationship.

Furthermore, the games sector relies on talented, creative people with strong technical ability. This case study illustrates that these skills are most often found in art college graduates. It also shows that artists and musicians serve the sector on a freelance basis by providing specialist short-term inputs that add value to gamers' experience – and the income that the games sector provides artists allows them to diversify their sources of income, which can be important in maintaining their artistic practice.

5 Case study 3: Music, adverts, trailers, TV and film – Harry Lightfoot, composer/musician

5.1 Introduction

Chapter 2 highlighted the significant contribution that the creative industries make to UK exports, as well as noting the preponderance of micro-businesses in the sector. This case study provides an illustration of a supply chain linked to music for film, TV and advertising that runs from a freelance composer, based in Royal Leamington Spa, to national and international markets, including Hollywood.

5.2 History

Harry Lightfoot studied jazz saxophone at Birmingham Conservatoire. He graduated in 2007. Initially, he followed a traditional career path for music graduates: teaching, along with professional gigs and tours.

When Harry was part of a band, he signed with what was then a newly formed music publisher, Accorder Music (Box 5-1). After the band split up, he worked with Accorder Music to win work composing music for TV. His first commission was to compose music for a 6-part BBC documentary series, *The Fisherman's Apprentice with Monty Halls*, which was broadcast in 2011. This job provided Harry with a springboard from which to launch a new career that drew on his musical training but applied it in the creative industries, particularly, film, TV and TV advertising.

Box 5-1: Accorder Music

Accorder Music is a music publisher for film, TV and games. It works with production companies and composers around the world focusing on maximising music royalty revenues and achieving creative success.

The company operates at all stages of the production process, from engaging a composer for a producer through to collecting royalties from performance or licensing, and from secondary rights, such as cable retransmission fees.

Its label, Redroccaa, focuses on synchronisation¹⁵ for films, TV, adverts and games, and its music catalogue, Accorder Tracks, offers tracks with a pre-cleared international blanket licence.

Harry has operated, and still operates, in a number of different market segments, producing music for TV and film, TV advertisements, and film trailers. He also serves a number of different geographic markets, including in the Far East, e.g. Singapore, and North America, e.g.

¹⁵ A music synchronization license is a music license granted by the holder of the copyright of a particular composition that allows the licensee to synchronise ("sync") music with film, TV shows, advertisements, video games, accompanying website music, movie trailers, etc.

Hollywood. The balance of work between the different market segments has changed over the years. Much of the initial effort was put into freelance work for advertisements. This involved a lot of at-risk work with little or no remuneration and a 1-in-20 chance of success. Harry re-focused his efforts away from this part of the market, deciding only to respond to briefs with some payment for proposals, and by carving out time and space to win work producing music for film trailers.

5.3 Current practice

Harry has now moved from a situation where he was making two to three (mostly unpaid) pitches a week to write music for TV advertisements, to one pitch a month for TV advertisements – one of which was the McDonald’s 2016 Christmas TV advertisement. Similarly, TV work derived via Accorder, is now in the order of one commission a year. Harry is now almost exclusively writing music for film trailers, including *Pirates of the Caribbean 5* (see Box 5-2). This move has been immeasurably aided by digital technology, from a single location in the Midlands, Harry is able to export to any part of the world.

Box 5-2: Operation of the film-trailer market

The film trailer and ‘sync’ markets operate in two distinct ways:

- composers receive commissions to produce the music for a trailer for a specific film, perhaps based on a theme or a song in the film’s soundtrack – the risk here is that if a client decides not to use the piece, then the work cannot be used in another way, as the composer does not own the appropriate rights; and
- companies and composers develop a library of tracks – at risk – from which producers may licence tracks for a given period of time, e.g. exclusive use of a track for six months – the risk of this approach is that a composer and publisher may incur costs for a track that no one picks up, the benefit of this approach is that the same track may be used more than once, generating multiple royalties.

The fees for a piece of music can vary by client and budget, for example, Hollywood blockbusters pay more than small independent movies – the range may vary, e.g. US\$10,000-US\$75,000. The deal between the composer and the publisher is usually 50:50 on performance royalties. In the case of a bespoke commission for a film trailer, for example, the composer would also receive an advance on the ‘sync’ fee.

Harry’s success in the film trailer market, which is a truly global market, has been cemented by his signing with Hollywood-based audiomachine (see Box 5-3). Harry produced the music for the trailer to *Beauty and the Beast*, which received 127.6 million views within the first 24 hours of its release – the third ever highest viewing figures for a film trailer.¹⁶

Box 5-3: audiomachine

audiomachine is a boutique, motion picture advertising music production collective, which began in 2005. It specialises in original music and sound design for theatrical trailers, television commercials and video game advertising campaigns. Unlike much of the industry, audiomachine supports live recordings in its pursuit of quality – building a market profile based on original composition, musicianship, and sound quality.

¹⁶ <https://www.forbes.com/sites/jordanpassman/2017/04/12/inside-the-competitive-business-of-music-for-film-trailers/#5b4728931fd4>

As well as exporting bespoke commissions to the USA, Harry has also developed an album of tracks for audiomachine's sync library. In this arrangement, Harry commits his time upfront at risk and audiomachine risks the costs of hiring an orchestra, recording studio, sound engineers and so on – in some cases these costs can run to six figures. These recording sessions may take place in different countries, including the UK, on such occasions, Harry, the one-time professional musician turned composer and exporter, helps to provide a source of employment for professional musicians.

5.4 The future

Harry plans to continue to work writing music for film trailers – which help him to realise his market value more often and more effectively than other forms of composition – while also seeking to develop his professional network further, in order to move into composing original soundtracks for movies.

5.5 Conclusions

The production of music for advertisements, film and TV, and film trailers generates significant revenues. The sector's operations are based on the generation of Intellectual Property, in the form of compositions, which may then be used to generate income via licensing. It operates from the lone freelance composer, such as Harry, through to major Hollywood studios, via publishers and agents who mediate between client and composer and, as in the case of audiomachine, seek to maximise the value of their services by working with composers and musicians to produce quality live recordings – demonstrating the value that the performing arts can add to this sector. Digital technology enables individual composers and musicians to generate tracks quickly and cheaply, and as important for the economic impact of the sector, it also enables virtually frictionless trade, as audio files can be sent from a studio in the UK to any part of the world – meaning the music for the trailer for a Hollywood blockbuster, such as *Beauty and the Beast*, can be produced by a composer working alone in the UK and exported to the USA within a matter of days.

6 Case Study 4: Interaction Designer, Creative Director, Lecturer and Artist – Joel Gethin Lewis

6.1 Introduction

Education – both arts education and non-arts education – plays a vital role in the development of the creative industries. This case study explores the circuitous route by which one artist, Joel Gethin Lewis, developed his practice and came to operate in both the arts and creative industries: Joel describes himself as having a “hybridity of skills”.

This case study also provides a specific example of how project work and portfolio careers, which span both the arts the wider creative industries, create significant opportunities for creativity and how skills and knowledge developed in the arts world can add value and insight into different aspects of the creative industries, including design.

6.2 History

Joel took Design and Technology at GCSE and enjoyed the artistic elements of his school study. However, he was always drawn to mathematics and sciences; the application of a clear method to find a solution suited his style of learning at the time. Following this logic, he took Maths, Physics and Chemistry at A-Level, aiming for future work with computer and maths.

Joel completed his A-Levels at the age of 17. Before going to university, he undertook a 12-month placement on the IBM School Leaver Programme, where he met people he wouldn't necessarily have been exposed to so intensively in a 'standard' education environment.

From IBM, Joel went on to study Mathematics and Computer Science at Imperial College London. His study was equally split between the two subjects, which for some tutors indicated a lack of commitment to selecting a specific field. A theme that will be returned to.

At Imperial, Joel became an active contributor to the Student Newspaper and got a summer job with Dazed & Confused. This turned into a five-year relationship, which he carried out alongside his studies.

His experiences whilst working for Dazed & Confused shaped his educational choices and it was from here that he decided to apply to the Royal College of Art. He was accepted onto the Interaction Design MA. His comparatively modest CD-ROM portfolio piquing the interest of interviewers, particularly his user-interface work and programming skills. He completed his MA in 2003, his final show focused on blending the analogue into the digital.

In 2004 Joel spent a year in Italy in the Interactive Department at Fabrica, a creative communications research centre.¹⁷

¹⁷ <http://www.fabrica.it/about/>

‘Fabrica aims to inspire a specific creative category of young “social catalysts” who, at the end of their experience at the centre, will continue their work independently.’

Whilst with Benetton, Joel became aware of United Visual Artists (UVA), and in his own words “bombarded them” with requests for a placement or job, requests which were consistently rebuffed. Undeterred, he arrived back from Italy, turned up on their doorstep and persuaded them to give him a job. One month later he was working with U2 on their world tour. He was hired by UVA to take their existing work and add an element of interactivity to it, using technology to make experiences more human and responsive. At this point in his career, he also began working on installations in a fine art context.

Box 6-1: Interactive Art: Volume

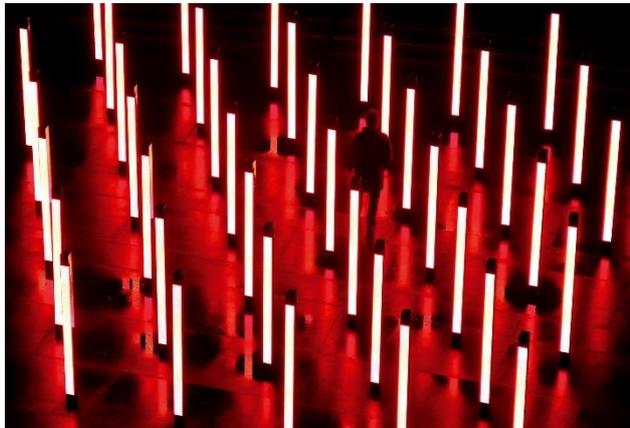
Volume first appeared in the garden of London’s V&A museum in 2006 and has since travelled as far as Hong Kong, Taiwan, St. Petersburg and Melbourne.

It consists of a field of 48 luminous, sound-emitting columns that respond to movement. Visitors weave a path through the sculpture, creating their own unique journey in light and music.

The result of a collaboration with Massive Attack, Volume won the D&AD Yellow Pencil in 2007 for Outstanding Achievement in the Digital Installation category.

See more:

<http://uva.co.uk/works/volume>



6.3 Current practice

Following his time at UVA Joel combined teaching and lecturing with business, as one half of Hellicar & Lewis, a craft, design and technology studio. The studio delivered a mix of projects:

- Arts: interactive arts projects or installations, usually for publicly funded organisations or institutions;
- Commercial: digital and interactive projects with private sector, primarily for the purpose of marketing; and
- Therapeutic: experimental projects that explore touch, gesture and movement through a digital interface, working with people on the autistic spectrum and those with profound learning difficulties.

This mix of activities was semi-accidental, following the interests and previous experiences of Joel and his partner Pete Hellicar. However, the projects in autistic therapy and work with institutions tended to provide an 'R&D space'. Whilst these projects had smaller budgets than other commissions, there was more scope for experimentation. This allowed them to try new things and then use what they learnt in the commercial world – where people often want specified outcomes, even when they ask for something innovative.

'Companies want something brand new that's never been done before, but want to see it before they pay for it.'

Box 6-2: R&D for commercial work through arts and therapeutic projects

The linkage between therapeutic, arts and commercial projects is illustrated across the following three projects:

- **Somability (2015)** A series of technology applications to promote expressive movement and collaboration among people with profound and multiple learning difficulties in their day service settings. Key to Somability has been to engage carers in co-creation, using role-play, rehearsal and performance as methods for discovery and development throughout the project lifecycle. Regular exposure to the technologies is leading to ideas for choreographing a series of performances, beginning with peer-to-peer, and family "sharing" to more ambitious local community and national public events.
- **Remembering The Future – Circulate (2015):** An outdoor artwork to connect the outer boroughs of London, a collaboration with six art centre youth groups and Emergency Exit Arts. Building characters created by youth groups in 3D and an installation that would map them to the movements of passers-by in real time.
- **Adventure Time - An Ooo Experience (2016):** A live interactive experience created for Cartoon Network UK that toured five shopping centres around the UK in the summer of 2016, with the tour continuing to Europe later in the year. Participants could battle alongside and even become Adventure Time stars.

The flow of the work was begun with Somability and other therapeutic projects that used the Microsoft Kinect 3D sensor to allow real-time body tracking. This was continued in Remembering the Future, and through demonstrating that, won the work with Adventure Time.

See more at:

<http://www.hellicarandlewis.com/somability/>

<http://www.hellicarandlewis.com/circulate-remembering-the-future/>

<http://www.hellicarandlewis.com/adventure-time/>

Due to changing family circumstances, Joel and Pete decided to close Hellicar & Lewis at the end of 2016. And so, Joel arrives at the point of a portfolio career as an Interaction Designer, Creative Director, Lecturer and Artist.

He has selected these activities to focus on the aspects of his work to date that he has enjoyed the most and to balance income across relatively steady teaching work and less predictable consultancy projects and commissions, with his own art practice.

6.4 Conclusions

Discussion with Joel demonstrates the positive role his educational experiences have played in shaping his career decisions. The support of good teachers has been key. Opportunities for learning functional skills alongside core content have also been important, helping to prepare him for the realities of working life in the sector.

“All of my family had ‘jobs for life’, starting a business or being a freelancer was completely alien to them. The training provided by the RCA was really important ... setting up in businesses is what you did when you graduated from the MA, there was nothing inherently unusual or about it. It was de rigeur.”

Work experiences concurrent with education have also been critical and Joel’s personal tenacity is also clearly a factor in his career success. He has sought out experiences, approached people, taken risks – kept going.

Artist is a term Joel has only recently come to use. Though it’s a term his peers would readily use to describe him, it’s not one he would naturally select himself. He recognises, however, that perspectives on and opinions of what you do, and therefore how you are labelled, is hard currency in the sector. Returning to the problem of being neither mathematics nor computing specialist while studying at Imperial, he is in some situations too ‘arty’ and in some not sufficiently so. In an example of the latter, Joel was turned down for a residency in a studios programme because his status as a business owner meant that he was not considered to be an artist. The labels he uses to describe himself are therefore constantly changing so that he can fit into the boxes people want to place him in.

Accepting, enabling and encouraging people to take alternative routes, to combine and explore diverse interests is key to unlocking the potential value of knowledge spillovers. The challenge is for more people to see “hybridity” as a virtue, rather than implied capriciousness.

7 Case Study 5: Architecture and the Visual Arts – Hawkins\Brown

Introduction

As previously noted (Case Study 1) work in arts and culture and the creative industries is characterised by collaboration. In a sector dominated by sole traders and micro-businesses, this is often typified by groups of individuals coming together to deliver a project. This case study considers collaboration from an organisational perspective; exploring architects Hawkins\Brown's practice of working with artists to deliver design projects, which is embedded as a strategic approach to delivering added value for clients.

History

Hawkins\Brown was established in 1988, with the specific vision of being an architectural practice with a committed social and cultural agenda and an innovative, collaborative approach to projects, principles which remain core today. An important aspect of Hawkins\Brown's practice is to work collaboratively with artists, bringing new thinking to the design process to deliver thoughtful, site-specific outcomes within a building project.

This pro-active approach to working with artists has been led by Morag Morrison¹⁸ (Partner and Interior Designer) and grew from her personal experience of undertaking an MA in Art and Architecture at the Kent Institute of Arts and Design (1994), then one of the first collaborative courses of its kind. The course brought together individuals from a range of backgrounds across architecture, fine art and design and provided an enabling space to explore the potential for fusing together different approaches to projects. On the course, Morag made personal connections with artists, which turned into working relationships that continue today. Working freelance (and often with Hawkins\Brown) at the time of her MA, Morag joined Hawkins\Brown full-time in 2002 and continues to be a strong advocate for collaborations between designers and artists.

Current practice

Hawkins\Brown has worked on several projects where artists are integrated as part of the design team. The artist is most frequently engaged once a scheme is at concept or developed design stages of the RIBA Plan of Work¹⁹, which is when the team has a clearer understanding how the spaces will work and where it would be beneficial to have some artwork. The level of involvement varies, from some projects where art is integrated for purely aesthetic purposes, to others where an artistic process is employed within the design process to create an identity for the space; translating and integrating how the users of a building want to project themselves to the outside world.

¹⁸ <https://www.hawkinsbrown.com/about-us/people/morag-morrison>

¹⁹ <https://www.ribaplanofwork.com/PlanOfWork.aspx>

Box 7-1: Salt Bridges

Salt Bridges is an ambitious contemporary arts programme that was integrated into the new building designed by Hawkins\Brown for Oxford University's Department of Biochemistry.

Located in the University's Science Area in central Oxford, adjacent to the Pitt Rivers Museum and the University Parks, New Biochemistry provides state-of-the-art research facilities and an outstanding host environment for visiting researchers, students and the public. Hawkins\Brown worked with the department, consultant artist, Nicky Hirst, the Ruskin School of Drawing & Fine Art and Artpoint on a programme of commissions for the new building with the following aims:

- To create an outstanding contemporary art collection within a world-class scientific research department.
- To facilitate inter-disciplinary discourse and opportunities for artists and scientists to extend their practice and experiment.
- To involve artists in the intellectual life of the department.
- To provide new approaches and resources for public engagement with both the arts and science.

Salt Bridges is a phrase Nicky Hirst encountered during her research with the scientists. In protein chemistry, it refers to ion pairs, a form of strong interaction between oppositely charged residues. As a title for the art programme Salt Bridges refers literally to a fragment of biochemistry research and metaphorically to the dynamic relationships it is supporting between artists and scientists.

Award-winning contemporary artists Annie Cattrell, Peter Fraser and Tim Head joined Nicky Hirst to create a number of site-specific artworks.



Source: <https://www.hawkinsbrown.com/projects/salt-bridges>

There is often greater interest from Local Authority or other public sector clients to integrate an element of art into a build (often public art), and some may write into a project the requirement for a proportion of the budget to be allocated to this integration, though this is not common practice. Never-the-less it is something Hawkins\Brown promotes the benefits of

(see Box 7-2 below for an example of Hawkins\Brown promotional text) and integrate when they can, recognising that it is not always possible or seen as desirable by clients.

The route to identifying artists to work with varies from project to project. In some, the opportunity is relationship based, or via recommendations from other artists. In others, the linkage to the site and locality is a strong driver for finding and commissioning the artists, for example, on a university build, looking to alumni from the arts department; or on a public realm project, working with local galleries to build a shortlist.

Box 7-2: Working with artists

Hawkins\Brown has built a reputation for working with both established and emerging artists like Daniel Buren, Tim Head, Nicky Hirst and Bridget Smith. We are currently running public art programmes at the University of Oxford and Reading University. We recognise the valuable role artists can play in creating unique and dynamic environments, contributing ideas, proposals and strategies which inform both the design process and the finished building.

Source: Hawkins\Brown

Whatever route to identifying the artist and the level of their involvement, it is important for the client to understand that integrating working with an artist is buying a process; it is not the purchase of a defined outcome and this is a key risk for clients as they don't know what they will get at the end of it. As such, they must trust the team to deliver and be fully engaged in the process. For Hawkins\Brown, their successful track record of working with artists is a key competitive advantage here. Whilst other architecture firms may be able to offer such a service, few have the skills and experience, in-house, to manage it and so often rely on a sub-contracted approach. The in-house expertise is a critical success factor; the team can demonstrate consistent, effective relationship brokering and management of risks, leading to high quality outcomes. The relationship management is crucial, supporting the artists who are (naturally) not experienced in working to the technical specifications required by an architectural programme. And in turn, supporting contractors, turning artists' work into plans and designs; information that contractors understand and can be integrated into building design.

Future

Hawkins\Brown is committed to delivering this integrated approach to design. Morag feels it is likely that the trend for working with artists on public buildings and spaces will continue and that there may be scope in the market for more art integrated design in commercial working environments:

“Culturally there is a trend for more domestic working environments. Ten years ago everyone said “the office is dead”, actually that’s not happened at all. People use the workspace as a forum for meeting and creating ideas. The more creative these spaces are, the more effective they are.”

There is an open question as to whether art integrated design will thrive in the housing sector, where budgets tend to be much more restricted. However, successful projects to date (such

as Box 7-3 below) and the potential for work on shared amenity space in private developments, suggest there may be scope.

Box 7-3: Burridge Gardens \ Connecting a community

A residential development, opposite Clapham Junction Station, of 300 'sub-standard' single tenure homes, within a walled estate with no public access. The estate is being demolished and rebuilt, in three phases, to provide 538 homes in a mixed tenure community.

Hawkins\Brown has collaborated with sculptor Rodney Harris, who is creating four brick reliefs in the building fabric. These reliefs recall the history of the site and residents' memories through objects, such as items of clothing, tools and domestic life.

The first piece represents a larger than life officer's jacket situated at a communal entrance. This has been installed with the other reliefs to follow.

A pineapple pattern, inspired by decorative carving on a building previously on the site, will be used on the entrance gates. The Pineapple is a symbol of welcome and hospitality and neatly symbolises the sites transformation.



Source: <https://www.hawkinsbrown.com/projects/peabody-st-john-hill>

Conclusions

Whilst art and architecture may seem on the surface to be a naturally occurring partnership, the difficult fit between the open, often more fluid working style and practices of artists and the controlled, specified nature of architectural design and build require a planned and managed approach to the collaboration for it to be truly successful. This case study therefore demonstrates the value to be gained from a strategic approach to collaboration.

The case study also emphasises the value of sharing process. Whilst in many situations, bringing together art and architecture results in artworks being added as embellishments²⁰, the approach taken by Hawkins\Brown is to embed and truly integrate artistic inquiry into the use of a space in the design process. This enables much greater linkage between the site-specificity of the build and the integrated artworks, which in turn increases the user value of the space.

²⁰ Coles, A (2010) Architecture with Arts in Mind, in Salt Bridges: Changing perceptions of art/architecture and science

8 Conclusions and reflections

This report has provided five cases from different parts of England to illustrate how different elements of the arts and culture landscape interact with the creative industries. These case studies help to put flesh on the bones of some important themes in relation to the interaction between arts and culture and the creative industries, including:

- the significance of small, micro-businesses to both the quantity and quality of the interaction between arts and culture and the creative industries;
- the role of personal networks in generating creative and business opportunities;
- the importance of clusters of creative businesses and arts communities in facilitating interactions between different parts of the arts landscape and the creative industries;
- the vital role that digital technology plays in enabling artists to develop commercial activity both in and for the creative industries, and in exporting their works and expertise to other parts of the world;
- the essentially collaborative nature of most of the endeavours covered by the case studies; and
- the importance of 'risk' to understanding relationships between the sectors – with artistic and creative processes being uncertain by their very nature, and commercial pressures often seeking to contain risks – the perfect relationship between artists and those in business is likely to be shared on a mutual love of risk.

In terms of lessons for future research, the study points to:

- The difficulties of untangling the different categories of activity once research delves into the individual business or the individual artist – the statistical categories and definitions of sectors and roles often melt into air;
- Potential areas for future study, such as:
 - The role of education and careers advice for students studying artistic subjects – as the creative industries grow and change are students receiving sufficient advice about the different markets and roles that might be available to them?
 - The role of artistic and business clusters in generating wealth and creativity in a place; and
 - The role of arts in other business sectors, such as medical devices and therapeutics.

