Skills Development **Scotland**

Sectoral Skills Assessment Creative Industries

October 2025



Sectoral Skills Assessments

First launched in 2017, Sectoral Skills Assessments (SSAs) provide a robust and consistent evidence base to support strategic skills investment planning. Skills Development Scotland (SDS) has worked with key partners and stakeholders to produce SSAs, ensuring an inclusive approach to their development, dissemination and utilisation.

SSAs include published data sets. Inevitably, when using published data there is a time lag, but the data contained is the most up-to-date available at the time of writing. SSAs also include forecast data commissioned through Oxford Economics.

The Technical Note¹ provides full detail on the caveats that must be applied when using forecast data, but broadly, it should be noted that:

- Forecasts are based on what we know now and include past and present trends projected into the future.
- The more disaggregated they become, especially at smaller geographical units, the less reliable they are likely to be.
- Their value is in identifying likely directions of travel rather than predicting exact figures.
- The forecasts do not account for national or sectoral activities, initiatives or investments that are planned.

Industries and occupations used in the SSAs are defined by Standard Industrial Classifications (SIC)² and Standard Occupational Classifications (SOC).³

This SSA report is for the Creative Industries sector. The Scottish Government describes Creative Industries as those with origin in individual creativity, skill and talent, or which have the potential to create wealth and jobs through the development, production or exploitation of intellectual property. Please see Appendix 1 for the SIC definition used in this report.

The SSAs are part of a suite of Labour Market Insight publications by SDS. Other products in the suite include:



Economy, People and Skills report which provides succinct and up-to-date evidence on Scotland's economy, businesses and people. It is published monthly.



Regional Skills Assessments provide a coherent, consistent evidence base to inform future investment in skills, built up from existing datasets and forecasts for College regions, Rural Scotland and all City and Growth Deals regions. These are published annually.



The **<u>Data Matrix</u>** is an interactive tool, offering more detailed data from a variety of sources in a visually engaging format. It is updated frequently.

Alongside the suite of Labour Market Insight publications, SDS also produces a wide range of reports such as statistics on Modern Apprenticeships and the Annual Participation measure for 16-19 year olds. This includes a wide range of data related to equalities. Further information can be found on the <u>Publications and Statistics</u> section of the SDS website.



We value user feedback on the Sectoral Skills Assessments.

If you would like to provide feedback, please do so **here**.

For any further information or queries on the SSAs or any of our other products, please contact: **RSA@sds.co.uk**

^{1.} SSA Technical Note (2025).

^{2.} Office for National Statistics UK Standard Industrial Classification (SIC) 2007.

The Context for Scotland's Labour Market

Over the past decade, the Scottish economy has experienced disruption driven by changes in the global political landscape, the cost-of-living crisis and conflicts in the Middle East and Ukraine. In addition, megatrends in demography, technology, and the environment have continued to shape Scotland's economy and labour market, many of which are interdependent. Below is an overview of the drivers that are expected to have the greatest influence on Scotland's labour market outlook in the near term, based on a comprehensive analysis of both structural and cyclical factors.

The Economy

Scotland and the UK experienced weak economic growth of 1.1% in 2024, with inflation also staying above the 2.0% target. Forecasters expect economic growth to remain at around 1.0% in 2025, with inflation also expected to remain elevated. The effects of rising prices and high interest rates continue to impact Scottish households and businesses. This contributes to the Scottish labour market being cooler in 2025, following a period of sustained tightness in recent years.

Demographic Change

Scotland's population is projected to grow until mid-2047, largely driven by positive net migration, which will offset the anticipated natural decline due to a falling fertility rate. However, whilst the population is growing, it is also ageing. Around one-fifth of Scotland's residents were aged 65 or over in 2024. By 2047, the number of people of pensionable age is expected to increase by 21%. This demographic change has implications for the economy and labour market, by affecting caring responsibilities, tax revenue. and productivity.

Inclusion and Equality

There is a lingering effect from the cost-of-living crisis, which began in 2021, with rising energy prices and financial pressures continuing to have a disproportionate impact on lowto-middle income households. Poverty, including in-work poverty, persists; however, the Fair Work policy agenda aims to reduce labour market inequalities. Barriers to accessing the labour market remain for disabled people and minority ethnic groups, and gender equality still requires progress.

Technology and Automation

Artificial Intelligence (AI) continues to be the core driver in technology transformation. Scotland has a strong technology sector, underpinned by extensive academic and business presence in AI and related fields. The adoption of Al is rapidly increasing among Scottish businesses, particularly in optimising workflows. However, the implications of AI for the labour market remain uncertain. Scotland's strong base in digital and data skills could provide an advantage, but maintaining a skilled workforce will be essential.

Climate Change and Net Zero

The transition to net zero will directly impact the labour market as actions are taken to meet net zero targets. This shift offers significant opportunities for job creation in Scotland, particularly in the clean energy sector. Scotland has strong natural assets, and existing sectoral strengths provide a strong foundation for a green economy. However, upskilling will be crucial for transition to net zero. Especially in the construction. manufacturing, agriculture, energy and transport sectors



Sectoral Insight¹

The Creative Industries in Scotland continue to make a vibrant and unique contribution across the country.

In December 2023, the Scottish Government published an <u>Action Plan</u> to support the Culture Strategy for Scotland (which was originally published in 2020). The action plan is structured around supporting the three pillars of culture as set out in the original strategy:

- · Strengthening culture;
- · Transforming through culture; and
- Empowering through culture.

Screen Scotland published research in August 2023 that found growth across all areas of production in Scotland between 2019 and 2021, particularly inward investment film and High-End TV (HETV), suggesting that some sub-sectors are recovering from the impact of the pandemic.

In March 2024, <u>Screen Scotland also published a new strategy</u>, which sets a target for continued growth of the sector, with the aim of reaching £1 billion GVA for screen within the Scottish economy by the end of 2030/31. This would be a 55% growth in the screen sector between 2024 and 2030. In addition, the strategy also sets a target for parallel job growth, with the aim of increasing the number of workers in FTE employment to 17,000 across the screen sector.

The importance of the Creative Industries sector is recognised in the most recent Programme for Government, published in May 2025, with the Scottish Government committed to increasing funding for arts and culture by £100 million more by 2028/29. The latest Scottish Budget for 2025/26 supported this through the announcement of increased funding for arts and culture, with an additional £34 million in the sector. Around £20 million of this will be channelled through Creative Scotland for its competitive multi-year funding programme for artists and cultural organisations.

In parallel with this, the government has also committed to reviewing how culture is delivered, including a review of Creative Scotland which is currently ongoing. In May 2025 the government produced the remit for an Independent Review of Creative Scotland which will consider the functions and remit of Creative Scotland; evaluate how it delivers its functions; and maximise the impact of the funding it provides to the culture sector.

In January 2025, <u>Creative Scotland also announced</u> it would support its largest portfolio of cultural organisations ever to be supported on a multi-year basis, which came alongside an uplift in the Grant-in-Aid funding from the Scottish Government. This announcement meant that an additional 141 organisations will receive multi-year funding.

This move was viewed as extremely significant across the sector, providing many cultural organisations with much-needed stability in funding.

It is important to note that the forecasts used in this Sectoral Skills Assessment are policy and investment neutral.



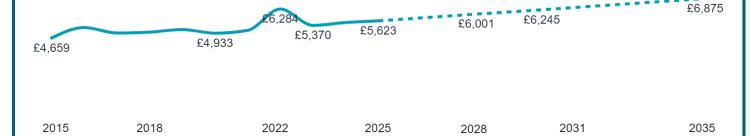
This means the figures present a baseline outlook that takes into account historical trends and external economic conditions, but the figures do not reflect investment or policy that is unconfirmed or at planning/development stage.

This would include, for example, recent funding increases for the arts and culture sector in Scotland.

Therefore, the forecasts should be used in conjunction with other sources, and readers are encouraged to overlay these with their own local and sectoral knowledge.

The Economy

Gross Value Added (GVA, £m) (2015-2035)1,2



In 2025, GVA in the Creative Industries sector was estimated to be £5,623m, generating 3.3% of Scotland's total economic output. Between 2015 and 2025, GVA in the sector was estimated to have increased by 2.4% on average each year, compared to equivalent annual growth of 0.9% across Scotland.

Looking ahead, GVA in the sector is forecast to grow on average by 2.0% each year between 2025 and 2035, which is slightly above Scotland's average (1.7%). In 2035, the Creative Industries sector is forecast to account for 3.4% of Scotland's total economic output.

Creative Industries forecast GVA in 2028: **£6,001**m



up 6.7% from 2025

Creative Industries forecast GVA in 2035: £6,875m



Scotland forecast GVA in 2028: £177,951m



up 5.2% from 2025

Scotland forecast GVA in 2035: £199,512m



up 12.1% from 2028

Productivity (GVA per job) 1, 3

In this report, we have used Oxford Economics' measure of productivity, which is calculated by dividing total sectoral GVA by total sectoral employment (measured by jobs). Please note, there are different ways of calculating productivity, and caution is needed when interpreting productivity data presented in this report. It must be considered in the context of other data and insight.

In 2025, productivity in the **Creative Industries** sector was estimated to be **£46,100**. In comparison, the Scottish average was £57,700.





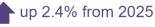
Creative Industries forecast productivity in

2028: **£47,900**



up 3.8% from 2025

Scotland forecast productivity in 2028: £59,100





Creative Industries forecast productivity in 2035: £52,900

Scotland forecast productivity in 2035: £63,600



np 7.5% from 2028

- 1. SDS (2025). Oxford Economics Forecasts.
- **2.** GVA is the measure of the value of goods and services produced within the economy and is an indicator of the sector's health.
- **3.** Productivity is the measure of goods and services produced per unit of labour input. The Oxford Economics forecasts of productivity shown here have been calculated by dividing total sector GVA by total sector

employment (measured by jobs).

Current Demand



Workforce size 2025: 110,800 people¹

This was estimated to account for 4.1% of Scottish employment.

The sector's workforce was estimated to have **increased** by **20.2**% (or **18,600** people) between 2015 and 2025.

This compares to a Scotland wide increase of **5.5**% or **141,500** people between 2015 and 2025.

Employment by Region (people), 2025¹

The greatest number of people employed in **Creative Industries** were estimated to be in:

Glasgow College Region*

Edinburgh, East and Midlothian

Lanarkshire

Tayside

30,000

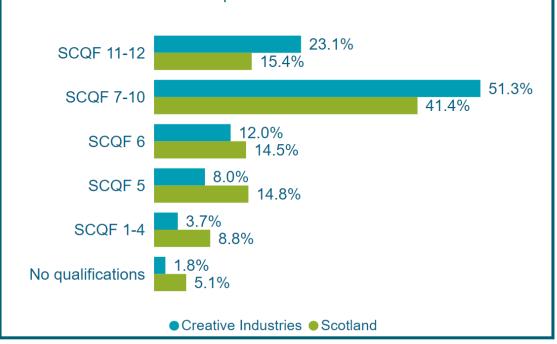
29,500

8,900

8,500

Workforce Qualifications, 2025¹

It was estimated that workers in the **Creative Industries** sector had higher qualifications than the Scottish average. In 2025, it was estimated that 74% of workers in the sector were qualified to SCQF Level 7 and above.²



Top 10 Employing Occupations (people), 2025¹



^{1.} SDS (2025). Oxford Economics Forecasts.

^{2.} See <u>SCQF Framework</u> for further information on SCQF qualification levels.

^{*}Glasgow College Region covers East Dunbartonshire, East Renfrewshire and Glasgow City local authorities.

Current Demand

The proportion of Local Authorities' workforce employed in Creative Industries, 2025^{1, 2}

Scottish local authorities have sectoral strengths that make them unique. This means that the **Creative Industries** sector may be more important to some local economies, as a higher proportion of the local workforce is employed in the sector.

The sector was most prominent in these local authorities:

City of Edinburgh

6.9%

Glasgow City

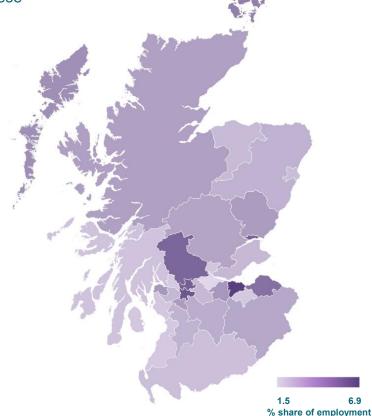
6.0%

East Dunbartonshire

5.8%

Dundee City

5.7%



1. SDS (2025). Oxford Economics Forecasts.

2. The proportion of the workforce in the Local Authority employed in the sector is calculated by dividing the sectoral employment in the area by total employment in the area.

3. Scottish Government (2025). Annual Survey of Hours and Earnings: 2024. The figures for 2023 have been revised. Due to data availability, a 'best fit <u>SIC code</u> approach' has been used, so the sectoral definitions and totals in this section may vary from those we have used elsewhere.

Real Living Wage and Gender Pay Gap³

Individuals earning Real Living Wage or more:

In April 2024, the real living wage rate for employees who did not work in London was £12.00.



Manufacturing

2023: **90.8%** 2024: **89.1%**

Professional, Scientific & Technical Activities

2023: **94.3%** 2024: **93.3%**

All sectors 2023: **89.8%** 2024: **88.6%**

Gender Pay Gap for median full-time hourly earnings:



Manufacturing

2023: **15.7%** 2024: **9.7%**

Professional, Scientific & Technical Activities

2023: **25.3%** 2024: **22.3%**

Scotland: 2023: **1.4%** 2024: **2.2%**

Due to data availability, a 'best fit SIC code approach' has been used, so sectors definitions here may not fully match key sector definitions.

Modern Apprenticeships⁴



MA starts for Creative & Cultural Skills*:

Q4 2023/24: **129** Q4 2024/25: **97**

For the latest quarterly MA statistics, please click **here**.

Information and Communication

Arts, Entertainment & Recreation

Information & Communication

Arts, Entertainment & Recreation

2024: 81.2%

2024: 17.4%

2024: 6.8%

No data available

2023: **85.1%**

2023: 13.3%

2023: **6.2%**



MAs in training for Creative & Cultural Skills*:

Q4 2023/24: **130** Q4 2024/25: **105**

* Based on SDS Occupational Groupings.

For data on FAs and GAs please see the Publications section of our <u>website</u>. For data on colleges and universities please see Scottish Funding Council and Higher Education Statistics Agency.

4. SDS (2025). Modern Apprenticeship Statistics.

Job Postings^{1,2,3}



Between July 2024 and June 2025, there were 505,170 job postings in Scotland across all sectors. The labour market across the country has cooled following a peak in job postings in 2022, and since the end of 2023 the number of jobs postings each month has been broadly stable.



Spotlight on... Photographers, Audiovisual and Broadcasting **Equipment Operators**⁴

Between July 2024 and June 2025 there were 340 job postings for Photographers, Audiovisual and Broadcasting Equipment Operators. The number of job postings has decreased by 7.5% compared to the period between July 2023 and June 2024 (8.0% decline across all occupations comparatively). However, demand for these roles remained steady.

Top Locations:



Glasgow City 90 job postings



Edinburgh City 80 job postings





Aberdeen City 30 job postings

Specialised skills and knowledge included:



Photography



Image Editing



Adobe Creative Suite



Videography



Marketing



Median real-time advertised salary: £31,200



Spotlight on... Graphic and Multimedia Designers⁵

Between July 2024 and June 2025 there were 310 job postings for Graphic and Multimedia Designers. The number of job postings has decreased by 19.6% compared to the period between July 2023 and June 2024 (8.0% decline across all occupations comparatively). However, demand for these roles remained steady.

Top Locations:



Edinburah City 110 job postings



Glasgow City 100 job postings



10 job postings



North Lanarkshire 10 job postings

Specialised skills and knowledge included:



Adobe Creative Suite



Brand Management



Marketing



Animations



Typography



Median real-time advertised salary: £28,900

- 1. Lightcast 2025. Online job postings data provides a useful barometer for the health of the jobs market. It is important to note that the data does not capture all activity, so it should be considered as an estimate of activity.
- 2. Job postings are rounded to the nearest 10.

- 3. Data is for the period covering July 2024 June 2025
- 4. Data is based on SOC 3417 for the whole of Scotland. Median salary based on 34% of job postings.
- 5. Data is based on SOC 2142 for the whole of Scotland. Median salary

based on 34% of job postings.

Spotlight: Digital Practitioners in Creative Industries

Digital Practitioners in Scotland

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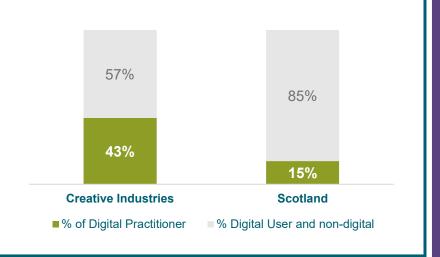
Recognising that digital skills permeate roles across all sectors and are no longer confined to traditional technology roles, SDS has undertaken research to define Scotland's Digital Economy in 2025, building on the <u>Digital Economy Skills Action</u> Plan.

This definition strengthens the evidence base and ensures SDS and partners can understand the spread of digital jobs across Scotland's key sectors and identify how digital transformation is shaping skills demand, productivity and sectoral growth. More information on this research is available in Appendix 2.

This spotlight focuses on the presence of **Digital Practitioner** roles within the Creative Industries sector. Digital Practitioners are occupations that utilise technical and professional digital skills, either within the traditional digital sector or integrated into other roles outside the sector. Digital Practitioner roles include occupations like **Design Occupations** and **Managers and Directors in the Creative Industries**.

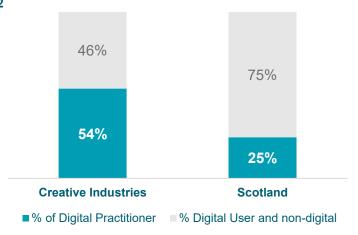
Employment ¹

In 2022, **43%** of people employed in the Creative Industries sector were employed in Digital Practitioner roles. This was higher than the Scottish average of **15%**.



Gross Value Added (GVA)²

Digital Practitioner roles within the Creative Industries sector make a sizeable contribution to the GVA of the whole sector (54% in 2022), higher than the average in Scotland.



Digital Insight for Creative Industries³



Digital skills are an important aspect of the Creative Industries sector, with many subsectors such as gaming relying heavily on digital practitioner roles. Scotland's gaming sector is a fast-evolving creative sector and is particularly important in the Tayside region as a key driver of economic growth, talent attraction and innovation.⁴

Digital roles in the Creative Industries sector are particularly prominent in the Glasgow City Region, which is a key employer in the Film, TV and Digital Marketing spaces.

Those working in the Creative Industries in Scotland recognise the opportunities associated with AI technologies and want to be involved in shaping how these technologies affect the future of the industry. However, there are some concerns about the implications of AI on creativity.⁵

- 1. SDS analysis of Lightcast Labour Market Data (2022, accessed in 2024).
- 2. SDS analysis of Annual Business Survey Data (2022, published in 2024).
- 3. Insight from the sector gathered via Skills Development Scotland (2025).
- **4** CodeBase. Gaming in Scotland: A Dynamic Force in Scotland's Creative Economy (2025).
- **5.** Creative Informatics. The Future of Creativity and AI: Views from the Scottish Creative Industries (2024).

Future Demand: Mid-term (2025-2028)¹

In the mid-term (2025-2028), the number of people in employment is forecast to grow by 3.0% (3,300 people) in the Creative Industries sector. This is a larger percentage growth than is forecast overall across Scotland, where employment is anticipated to rise by 2.5% (68,000 people).

By 2028, the regions forecast to have the greatest level of sectoral employment are **Glasgow College Region** and **Edinburgh**, **East and Midlothian**, the same as in 2025. Between 2025 and 2028, the sector is forecast to see the greatest growth in **Science and Technology Professionals (1,200 people)** followed by **Corporate Managers (500 people)**.

Forecasts for the mid-term (2025-2028) suggest there could be demand for **9,500 people in the sector**, as a result of the **need to replace workers** leaving the labour market and **opportunities created** through expansion demand. Whilst positive, caution is needed as a wide range of factors may impact the labour market over this period.

Workforce (people), 2028¹



Workforce size 2028: **114,100** people



The sector's workforce is expected to **grow** by **3.0**% (or **3,300** people) between 2025 and 2028



Compared to a Scotland wide increase of 2.5% or 68,000 people

Total Requirement^{1,2}





+



Total requirement: 9,500 people

Replacement demand: 6,200 people

Expansion demand: 3,300 people

Creative Industries is forecast to account for **2.4**% of Scotland's total requirement for people in the mid-term (2025-2028)

1. SDS (2025). Oxford Economics Forecasts.



The replacement demand is the number of people required to replace workers leaving the labour market (i.e. those who retire, move away or change jobs). Please note, figures are rounded to the nearest 100 and as a result totals may not equal the sum of the constituent parts.

^{2.}Total requirement for people is made up of expansion and replacement demand. The expansion demand is the number of people required as a result of economic growth or contraction.

Future Demand: Long-term (2028-2035)¹

Employment growth in the **Creative Industries** sector **is forecast to continue**, **with an increase of 3.4% (3,900 people)** in the long-term (2028-2035). This is a smaller percentage growth than is anticipated overall across Scotland, where employment is forecast to rise by 4.0% (112,500 people).

By 2035, the regions forecast to have the greatest level of sectoral employment are **Glasgow College Region** and **Edinburgh**, **East and Midlothian**. Between 2028 and 2035, the greatest growth is forecast to be in **Science and Technology Professionals (1,700 people)**, followed by **Corporate Managers (1,000 people)** in the sector.

Forecasts for the long-term (2028-2035) estimate that 18,200 people could be required in the sector. This will be driven by the need to replace workers leaving the labour market and the creation of opportunities through expansion demand. Whilst positive, caution is needed as a wide range of factors may impact the labour market over this period.

Workforce (people), 2035¹



Workforce size 2035: 118,000 people



The sector's workforce is expected to **grow** by **3.4**% (or **3,900** people) between 2028 and 2035



Compared to a Scotland wide increase of 4.0% or 112,500 people

Total Requirement^{1,2}









Total requirement: 18,200 people

Replacement demand: 14,300 people

Expansion demand: 3,900 people

Creative Industries is forecast to account for **2.1%** of Scotland's total requirement for people in the long-term (2028-2035)

1. SDS (2025). Oxford Economics Forecasts.



The replacement demand is the number of people required to replace workers leaving the labour market (i.e. those who retire, move away or change jobs). Please note, figures are rounded to the nearest 100 and as a result totals may not equal the sum of the constituent parts.

^{2.} Total requirement for people is made up of expansion and replacement demand. The expansion demand is the number of people required as a result of economic growth or contraction.

Appendix 1: Creative Industries Sector Definition (SIC 2007)

Sub-sector	SIC	Name	Sub-sector	SIC	Name
Visual Art	73.11	Advertising agencies	Audio- Visual	59.2	Sound recording and music publishing activities
	73.12	Media representation		18.20/1	Reproduction of sound recording
	71.11	Architectural activities		32.2	Manufacture of musical instruments
	90.03	Artistic creation		74 20/1	Portrait photographic activities
	47.78/1	Retail sale in commercial art galleries			Other specialist photography (not including portrait photography)
	31.09	Manufacture of other furniture		14.2012	
	16.29	Manufacture of other wood products		74 20/9	Other photographic activities (not including portrait and other specialist photography and film processing) n.e.c.
	32.12	Manufacture of jewellery and related products			
	32.13 23.41	Manufacture of imitation jewellery and related articles Manufacture of ceramic household and ornamental articles			Reproduction of video recording
	23.49	Manufacture of other ceramic products			Motion picture production activities
	23.49	Manufacture of hollow glass		59.11/2	Video production activities
	23.19	Manufacture of riollow glass Manufacture of other glass		59.12	Motion picture, video and television programme post-production activities
	47.79/1	Retail sale of antiques and antique books		59.13/1	Motion picture distribution activities
	95.24	Repair of furniture and home furnishings		59.13/2	Video distribution activities
	13	Manufacture of textiles		59.14	Motion picture projection activities
	14	Manufacture of wearing apparel		58.21	Publishing of computer games
	15	Manufacture of leather and related products			Ready-made interactive leisure and entertainment software development
	74.1	Specialised design activities			
	71.12/1	Engineering design activities for industrial process and			Television programme production activities
		production		59.13/3	Television programme distribution activities
	74.1	Specialised design activities		59.12	Motion picture, video and television programme post-production activities
Performance	90.01	Performing arts		60.1	Radio broadcasting
	90.02	Support activities to performing arts		60.2	Television programming and broadcasting activities
	90.04	Operation of arts facilities	Books and Press	90.03	Artistic creation
	78.10/1	Motion picture, television and other theatrical casting		58.11	Book publishing
Digital Industries	91.01	Libraries and archive activities		58.13	Publishing of newspapers
	58.29	Other software publishing		58.14	Publishing of journals and periodicals
	62.01/2	Business and domestic software development		58.19	Other publishing activities
	62.02	Computer consultancy activities		18.11 18.129	Printing of newspapers Other printing (not labels)
Cultural Education	85.52	Cultural Education		18.13	Pre press and media services
Luucation				63.91	News agency activities

Appendix 2: Digital Economy Definition Research

Project Background

In March 2023, SDS released the <u>Digital Economy Skills Action Plan</u> (DESAP), which emphasised the increasing importance of digital skills across all sectors in Scotland. While the Digital Tech Sector is well-defined and focuses on activity related to the production of digital technologies, the DESAP noted a lack of comparable data for the wider Digital Economy (which encompasses all economic activity that is enabled by digital technology) due to an unclear definition. To address this, SDS worked collaboratively with stakeholders to define the Digital Economy with the aim of improving the understanding of related jobs and skills.

Methodology

Following a literature review and stakeholder consultations, a final definition of the digital economy was produced (see below). This was then used to identify jobs (based on SOCs) and skills (from the Lightcast Skill Taxonomy) that were considered part of the Digital Economy. The research focused on Digital Practitioners as a particular area of interest to understand how skills that create or integrate digital technologies are permeating across occupations. This list of Digital Practitioner jobs and skills was then applied to the Scottish Labour Market to assess the economic value of Digital Practitioner jobs in Scotland.

Definition of the Digital Economy

E.g. cyber security, software engineering



Key Findings for Scotland



Estimated at almost 400,000, Digital Practitioner jobs in Scotland account for **15% of the total** workforce. This is comparable to the size of the Human Health and Social Work sector.



Digital practitioner roles contribute £34.6 billion in GVA to Scotland's economy, which represents around **25% of Scotland's GVA**.



At least **half** of all Digital Practitioner job postings require a **bachelor's degree or equivalent.**



The median advertised salary for Digital Practitioner job postings in Scotland was £38,627. This was 35% higher than the average median advertised salary across all Scottish job postings.



For further information or queries on the SSAs or any of our other products, please contact: RSA@sds.co.uk