**The geography of creativity in the UK**

**Report by Nesta and Creative England, July 2016**

**Summary**

* UK creative industries make a major contribution to the national GVA-5.2%, but this grew by 8.9% between 2013 and 2014, twice as fast as UK GVA overall.
* The impact and importance of the sector is much less well know outside London and the main cities
* There is rapid growth in the UK particularly in design, software, digital and advertising
* There is also an explosion of entrepreneurial activity, with the average size of a company getting smaller, now 3.3 pp per company
* A third of all clusters are in London and the SE
* There are creative conurbations as well as cities
* In the southern clusters, universities play a smaller role than in the north-an opportunity for southern universities.

National information

* The creative industries are now recognised as a driver of UK jobs, innovation and growth.
* Creative jobs are much less at risk as automation puts other sector jobs at risk.
* Attempts to build clusters from scratch barely succeed.
* The study is based on NOMIS/ONS data and uses the DCMS definition
* Using travel to work areas (TTWAs), the study identifies 47 clusters
* As far as sub-sectors are concerned, design is growing in number of businesses and turnover, and employ more than any other sub-sector. Architecture is the second highest in business numbers, then software and digital, and advertising. Publishing, music and performance arts are not growing as quickly, and in some areas, are contracting.
* London and the SE has more than half of all creative businesses and employees and London has 40% of employees and 33% of businesses, ie companies are bigger. The SE has less than half the businesses and employees compared to London but more than the third area of the UK- East England
* Concentration is increasing and a small number of TTWAs have become more important nationally. 26% of TTWAs that are growing in terms of business numbers, and 40% growing in terms of employees are in the SE. Some cities are also on this list of growing TTWAs.
* Southend and Colchester are in the top 15 TTWAs in terms of growth in creative employment but no Kent TTWAs are in this list

Kent clusters

* Of the 47 creative clusters, 3 are in Kent:

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| --- | --- | --- |
| Cluster | Growth/concentration | Notes |
| Medway | High growth | Architecture growing |
| Canterbury | High concentration | Concentration in architecture |
| Tunbridge Wells | High growth and concentration | As well as a cluster in its own right, joins up with Hastings, Brighton and Eastbourne to form a bigger cluster with concentration and growth in architecture, content and publishing |

ONS 2016

Tunbridge Wells has the biggest number (2,138) and concentration (11.5) of Kent’s 3 clusters. Medway has 1,699 and 7.4 and Canterbury 625 and 8.4 respectively. In terms of the fastest growing sub sector, software and digital, Medway has a high percentage (50%), T Wells 38% and Canterbury 36%.

NB Craft occupations are not included in the analyses in this report because they are notoriously difficult to measure as many are sole traders. It is possible that is why Folkestone/Margate for example are not listed clusters.

A further section about Higher Education includes Canterbury in the analysis. Medway is not included, probably because the FE presence is included under Canterbury and Greenwich, and T Wells is excluded for obvious reasons. Canterbury ranks 18th of the 33 clusters ranked according to various indices such as numbers of relevant ‘qualifiers,’ research and knowledge exchange. The area scores very highly on SME training and qualifiers in computer science and art and design. It scores relatively poorly on research and spin-outs. However when compared with the number of creative companies in the cluster, Canterbury scores well on talent, research and knowledge exchange.

A short section on networking (based on details from Meet-up) shows very strong links between the three Kent clusters and Folkestone, and weaker links between them and London. Canterbury also has strong international ties, especially with the EU.

**Assisting/nurturing creative clusters-policy advice**

The main points from this section are that:

* One size does not suit all-clusters are all very different and what works for one does not work for another
* Visibility and promotion is important to growth
* Clusters should be assisted to build on their strong points and ameliorate any weaknesses.

The full publication can be found here

<http://www.nesta.org.uk/publications>

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