



# Greater Cambridge Creative Industries

Draft v1.2

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17 June 2020

*Image: Jagex workspace,  
Cambridge Science Park*

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## Cambridgeshire creative industries economic growth: overview

The cultural and creative industries<sup>1</sup> are predicted to be a major growth sector. For young people graduating from secondary education in 2024, the growth of creative jobs is more than double the average growth of all occupations across the UK at 5.3%, and 2.5% respectively.<sup>2</sup> Nesta predicts that 87% of creative workers are at low or no risk of automation, compared with 40% as an average of all occupations. A distinctive feature of the creative industries is their increased collaboration and outsourcing, leading to the development of creative business clusters in specific areas of the country. This supports a key finding provided by Nesta that **75% of approximately 900,000 new jobs created within the creative industries between 2013 and 2030 will be in 10 national locations, of which Cambridgeshire is positioned ninth.**<sup>3</sup>

## Scale of the creative industries in Greater Cambridge

Data mining of the Companies House business register and mapping has enabled a visualisation of the CPCA creative businesses across all 6 local authorities, of which there are 5,703 in total<sup>4</sup>, with 3,093 or **55% located within the Greater Cambridge area.**<sup>5</sup> Of these businesses, 96.4% are private limited companies. Creative industry businesses make up roughly 10.1% of businesses overall within CPCA and **11.4% of all businesses in Greater Cambridge** (excluding businesses, self-employed and freelancers that do not pay VAT<sup>6</sup>). There are slightly more creative businesses within South Cambridgeshire than Cambridge City (1,578 and 1,514 respectively).

However, this does not take account of those businesses who are not VAT registered, estimated to be an additional **1,453 small businesses bringing the Greater Cambridge total to 4,545.**

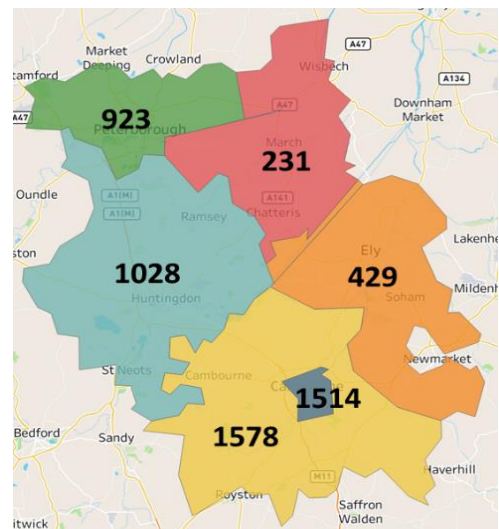
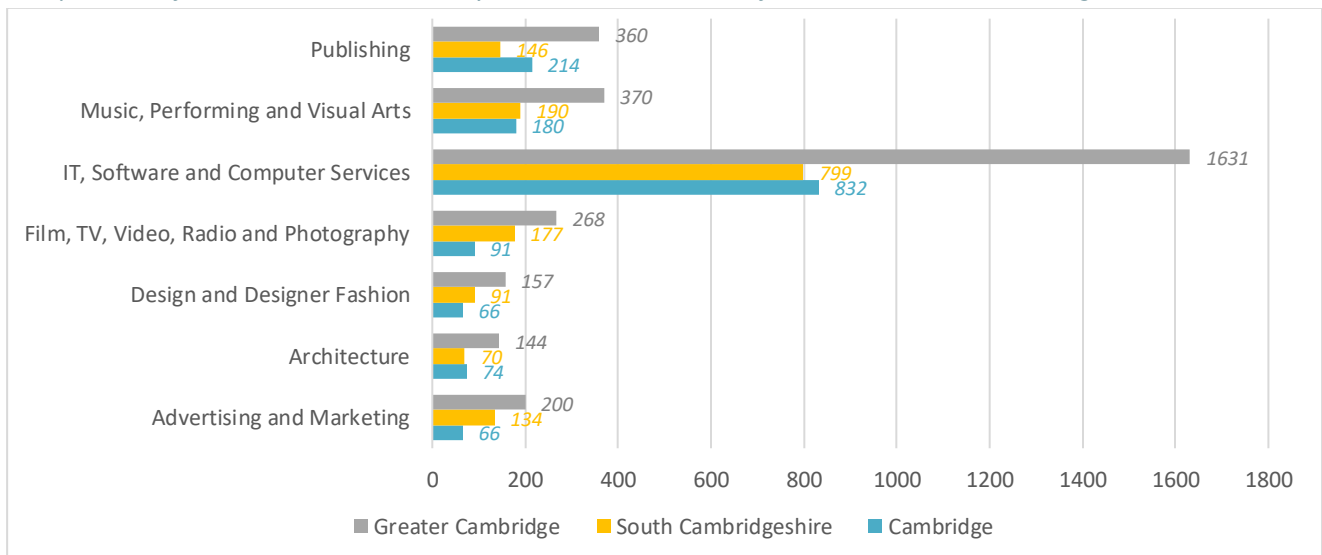


Fig 1: Number of creative businesses registered with Companies House by district local authority within the CPCA area

## Composition of the creative industries by DCMS broad sector definition in Greater Cambridge



<sup>1</sup> The cultural and creative industries includes architecture, advertising, graphic design, crafts, music, computer games, film, drama and performing arts, visual arts, sculpture, photography, TV and video, animation, literature, radio, publishing, creative writing, fashion design, software development and digital media. It includes venues and spaces such as museums, galleries, heritage sites, libraries, community spaces, archives, outdoor spaces where festivals take place, and enterprise zones.

<sup>2</sup> Creativity and the Future of Work, Nesta 2018

<sup>3</sup> Creative Nation, Nesta 2018

<sup>4</sup> Data correct at the time of accessing Companies House data, May 2020

<sup>5</sup> Cambridge 27%, East Cambridgeshire 8%, Fenland 4%, Huntingdonshire 18%, Peterborough 15%, South Cambridgeshire 28%

<sup>6</sup> The national average of professionals working in the creative industries is 47% (not registered with Companies House) compared to 15% across all workforce sectors, Creative Industries Federation

## Clustering of the creative industries within Greater Cambridge registered with Companies House

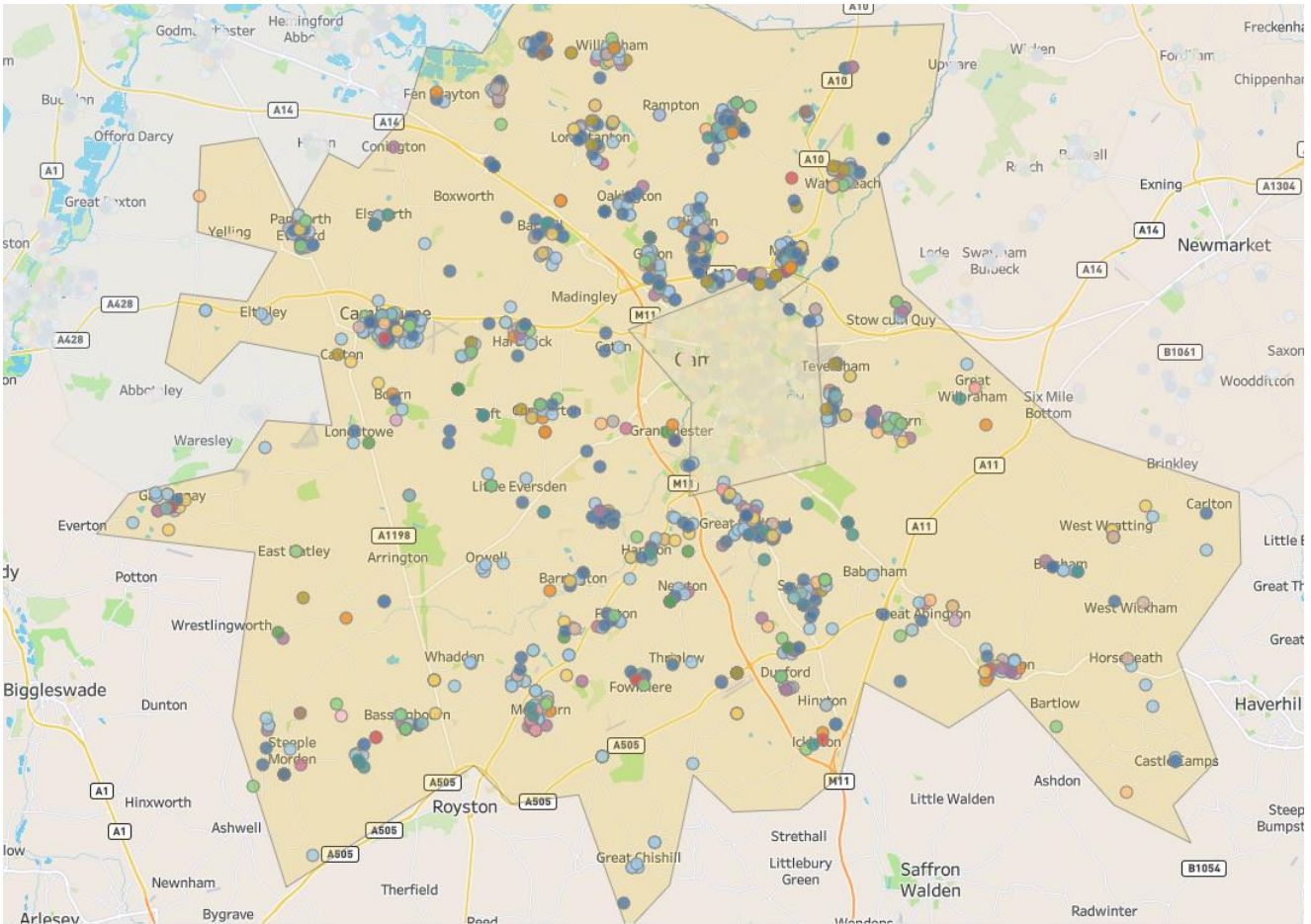


Fig 3: Location of all 1,578 creative businesses in South Cambridgeshire (click [here](#) for interactive map)

The location of businesses is typically more dispersed in South Cambridgeshire due to the greater geographic footprint, while Cambridge is denser and more evenly spread throughout the city. This reflects the findings of the Greater Cambridge Creative Workspace Supply and Demand report which highlighted a lack of a defined central hub or creative zone.

In South Cambridgeshire, clustering is more evident, particularly in locations close to the north city boundary including Waterbeach, Orchard Park, Impington, Girton, and Great Shelford; and North West of the city in Cambourne and South in Great Shelford and Sawston.

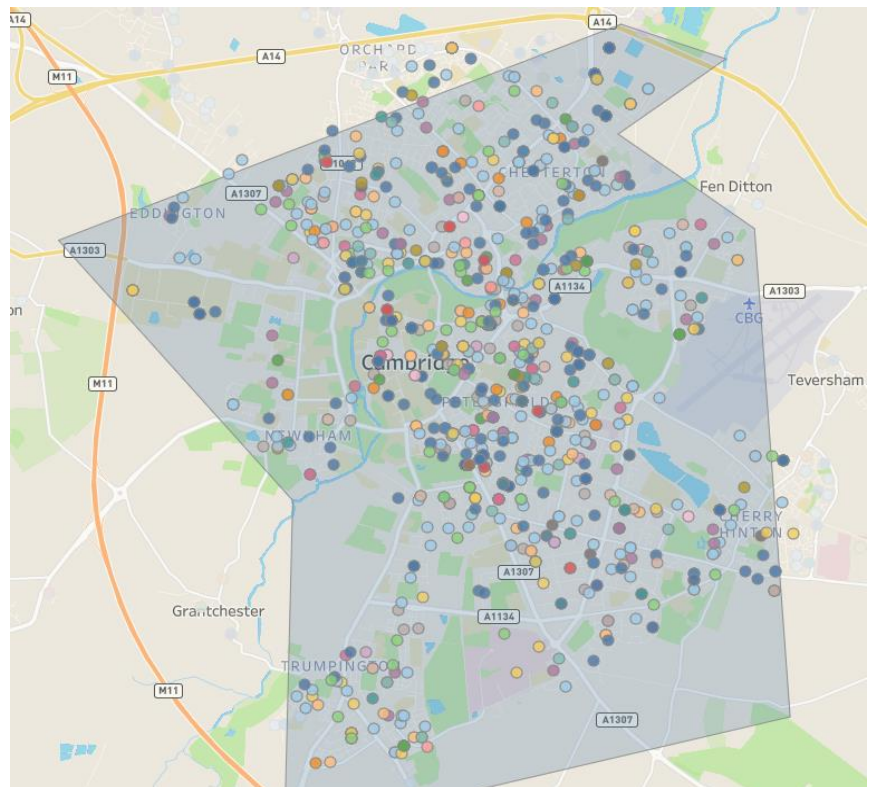
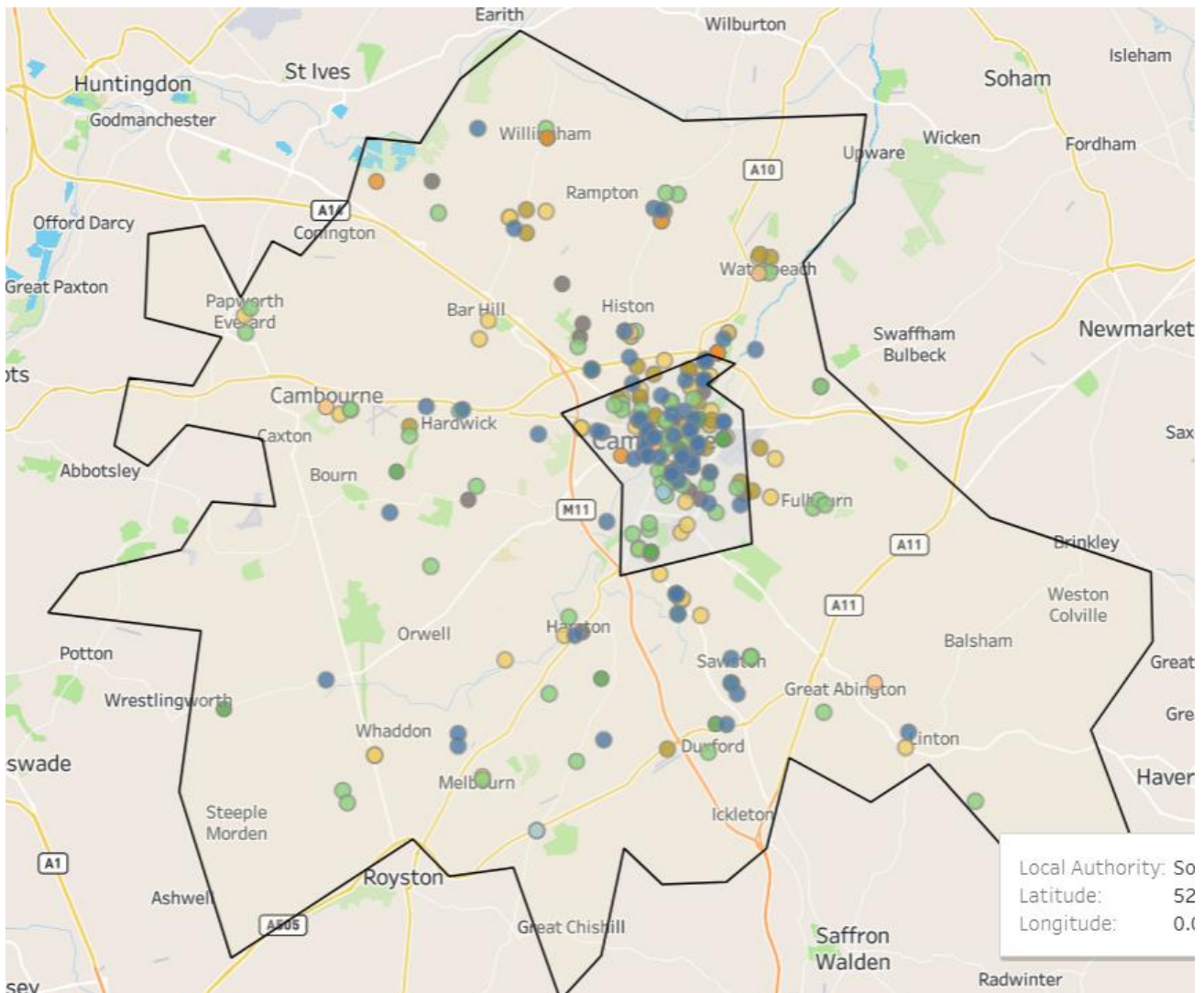
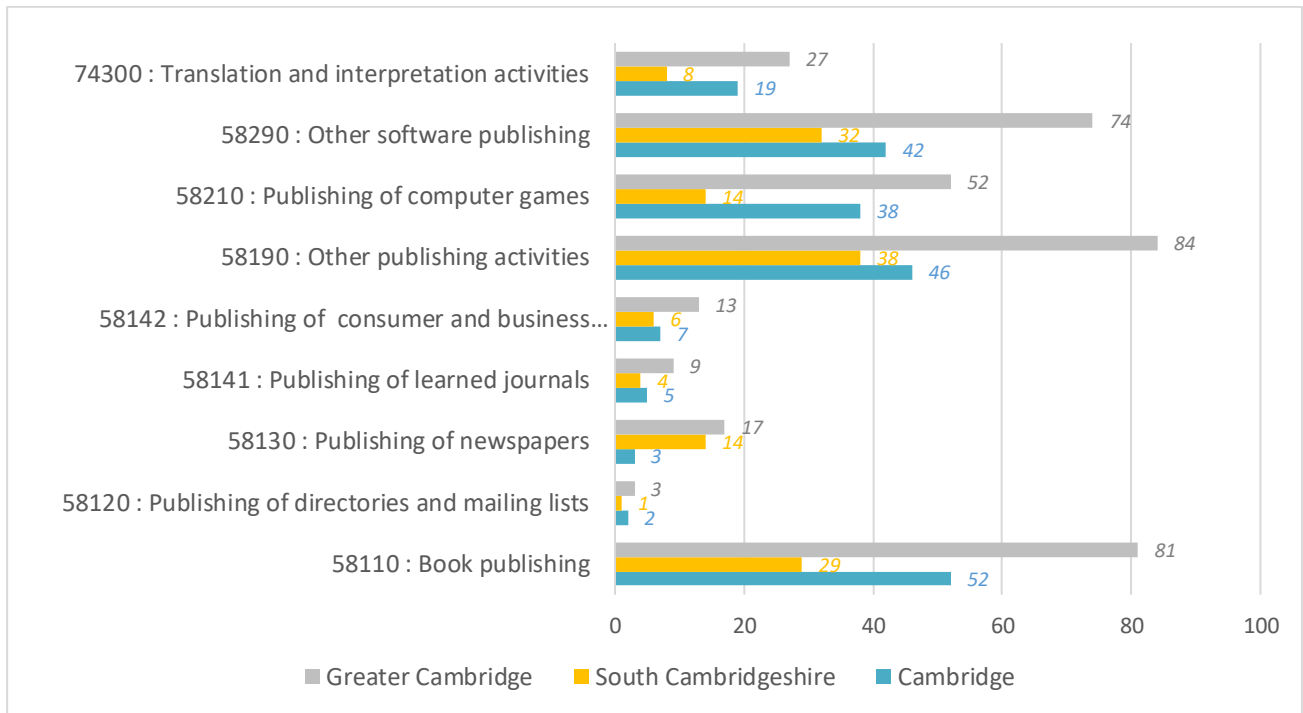


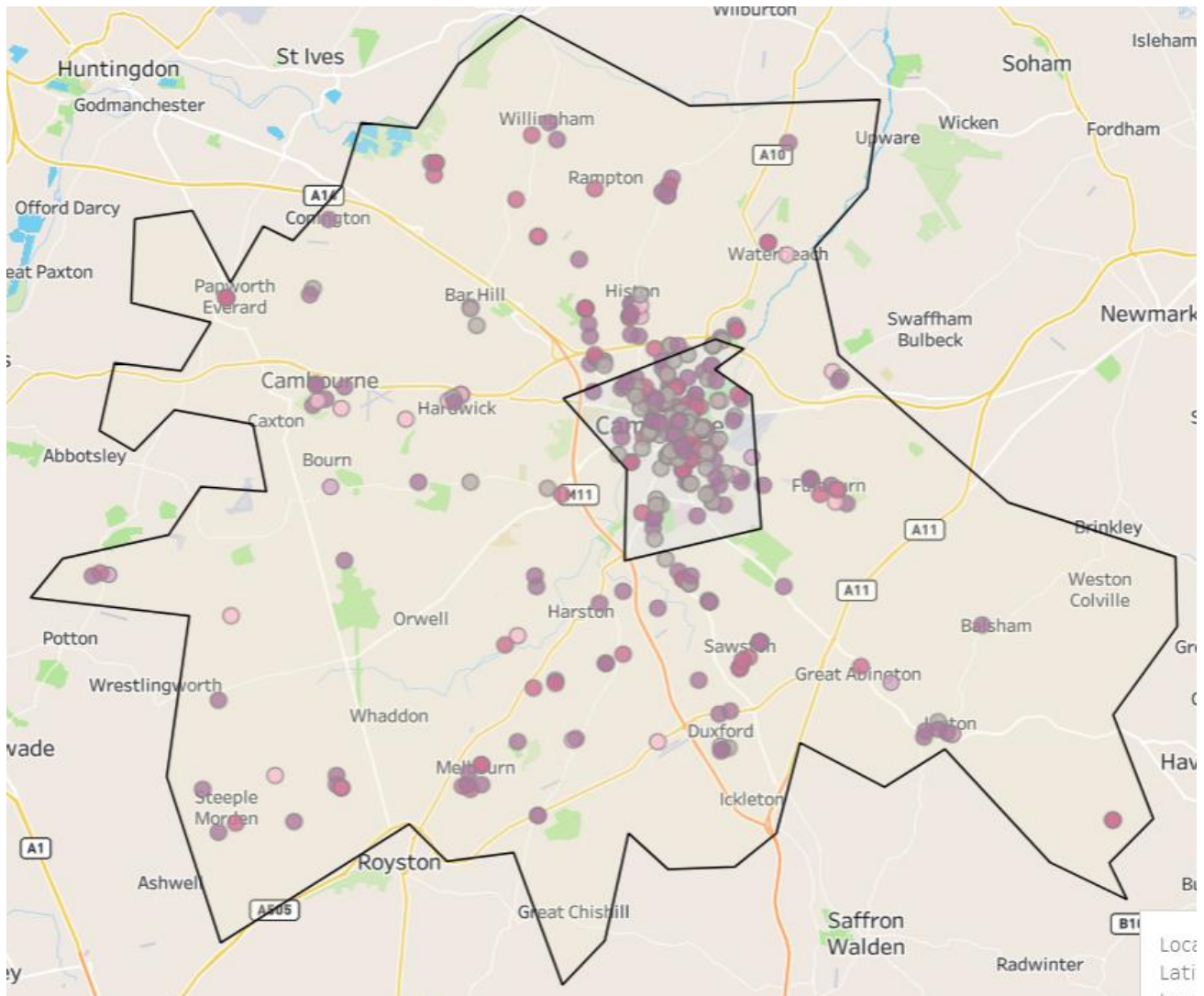
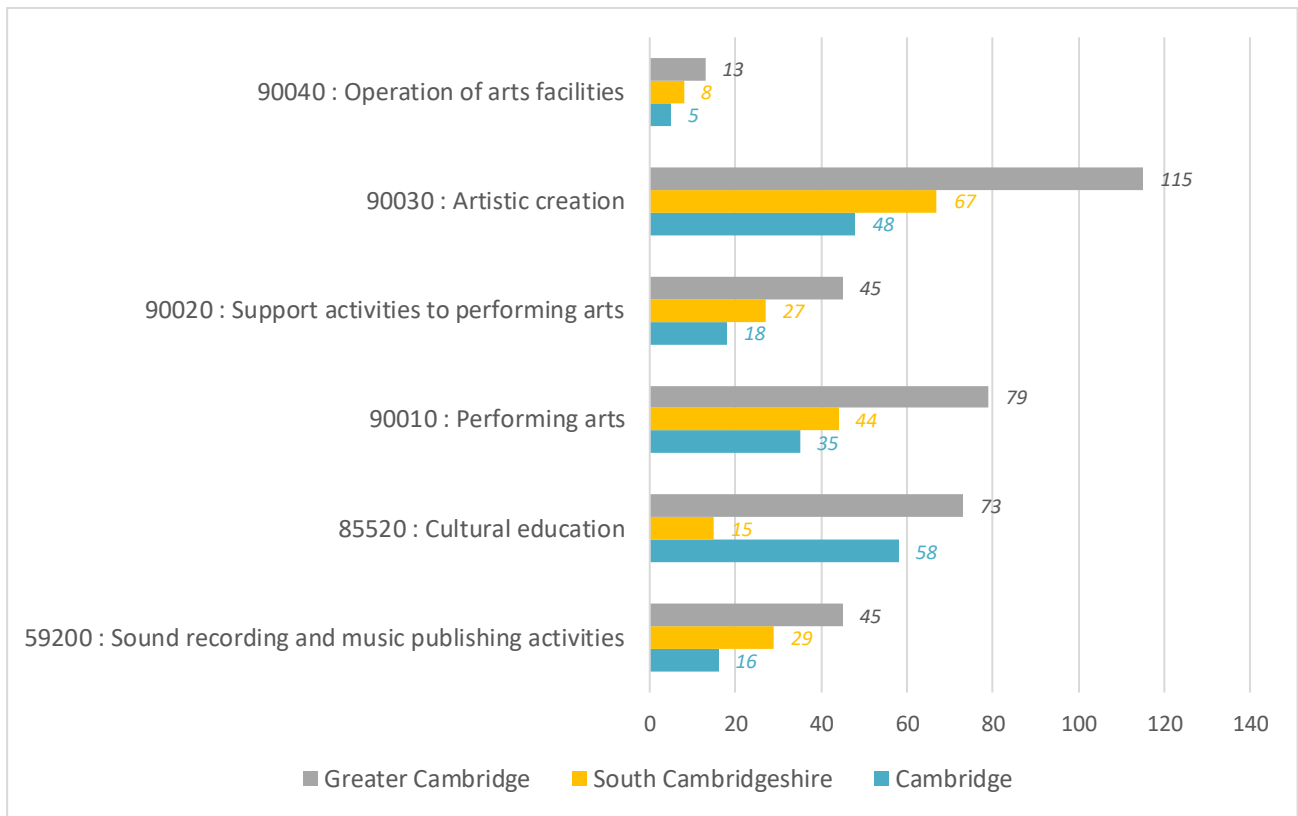
Fig 4: Location of all 1,514 creative businesses in Cambridge City (click [here](#) for interactive map)

# Detailed composition of the creative industries in Greater Cambridge by DCMS business sector and location

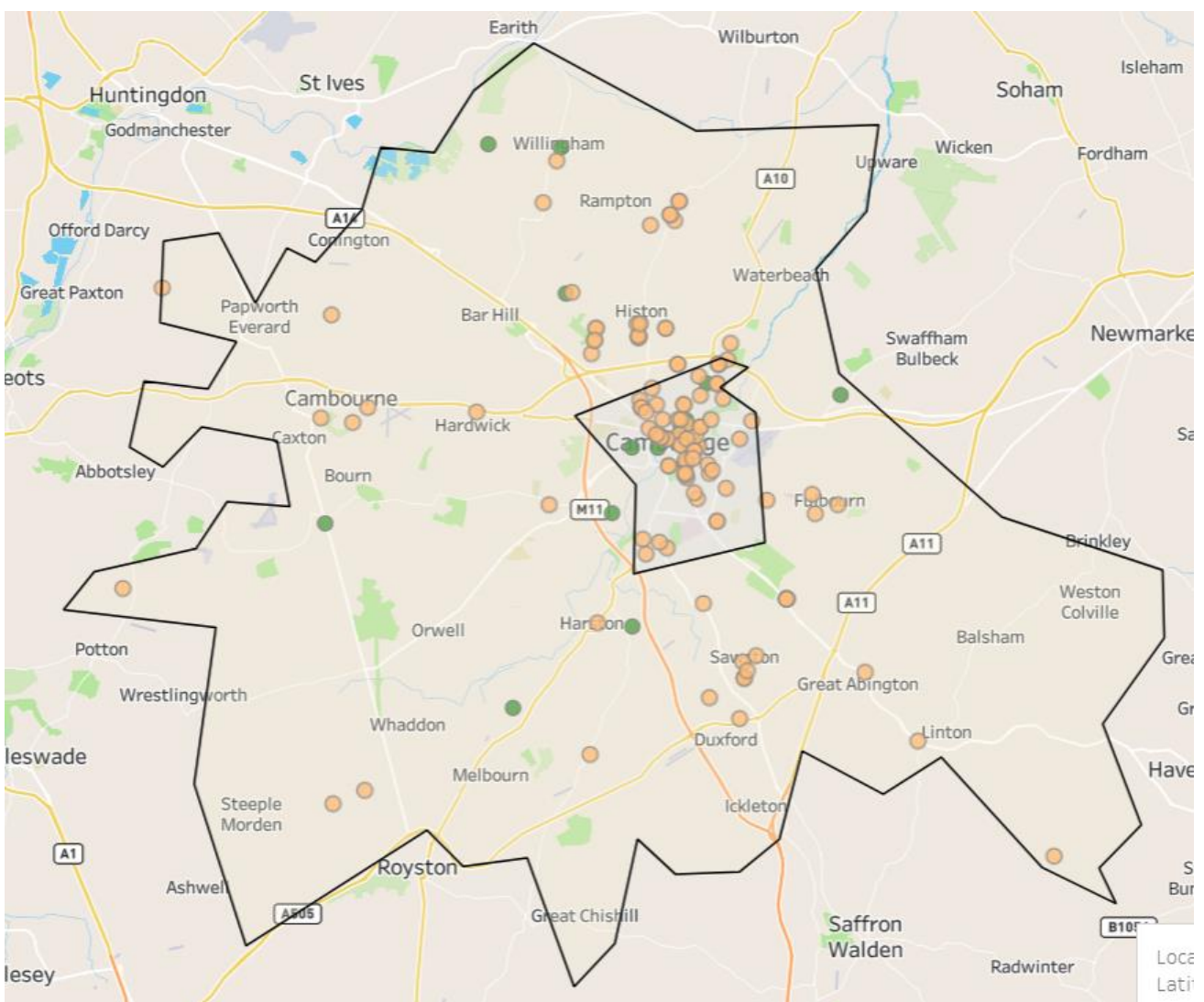
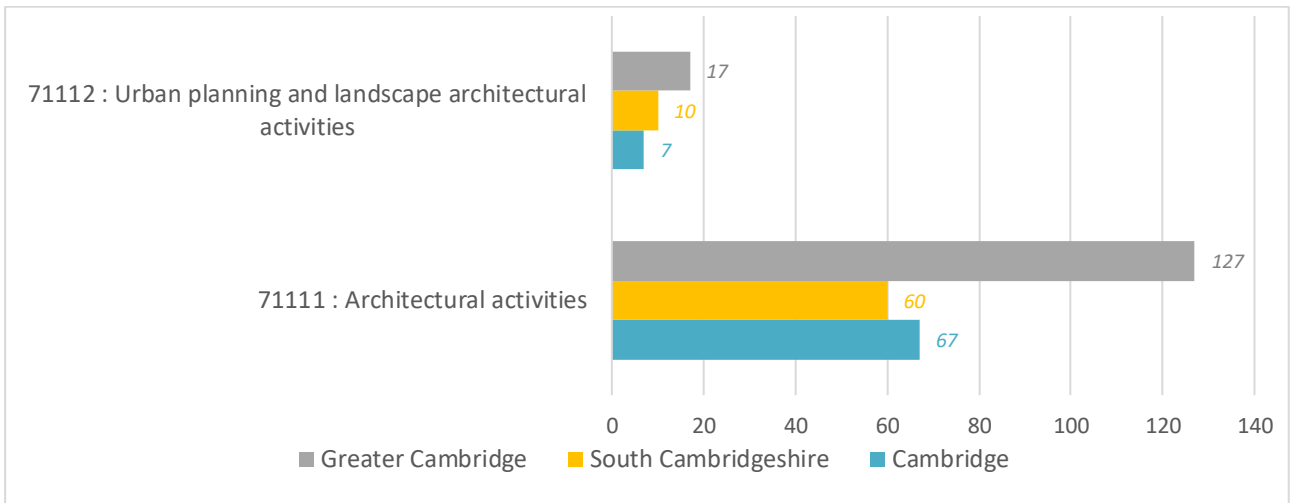
## PUBLISHING: 360 creative industry businesses



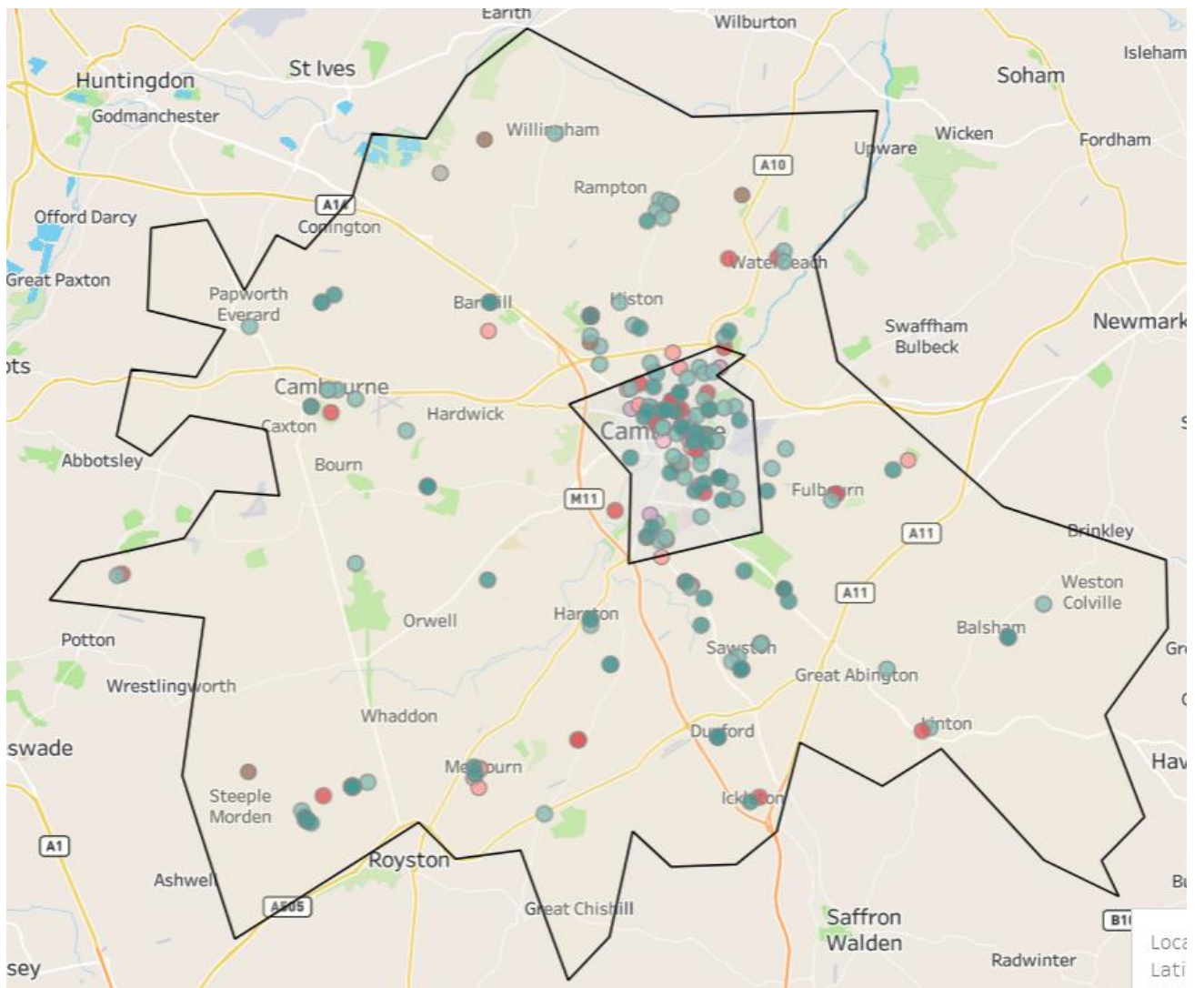
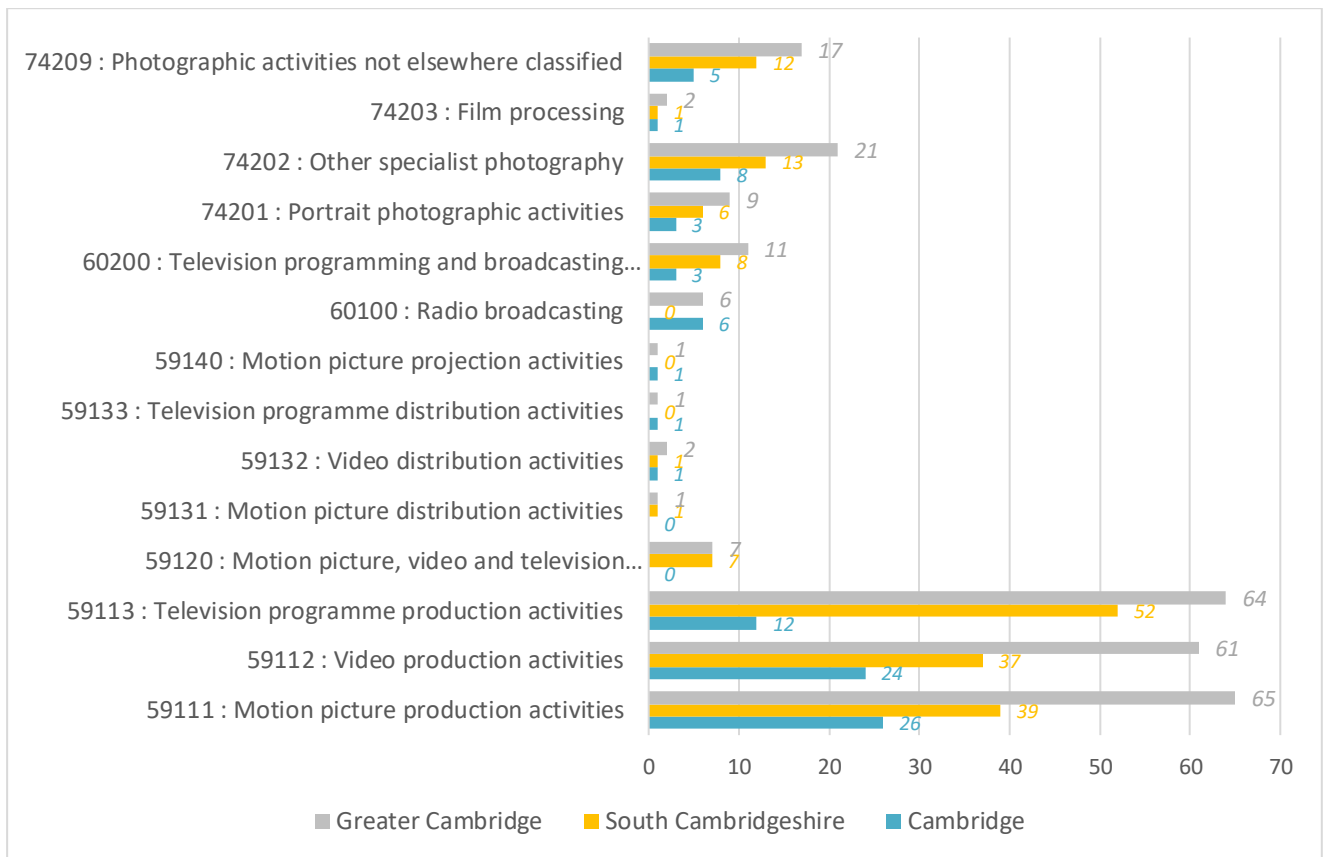
## MUSIC, PERFORMING AND VISUAL ARTS: 370 creative industry businesses



## ARCHITECTURE: 144 creative industry businesses

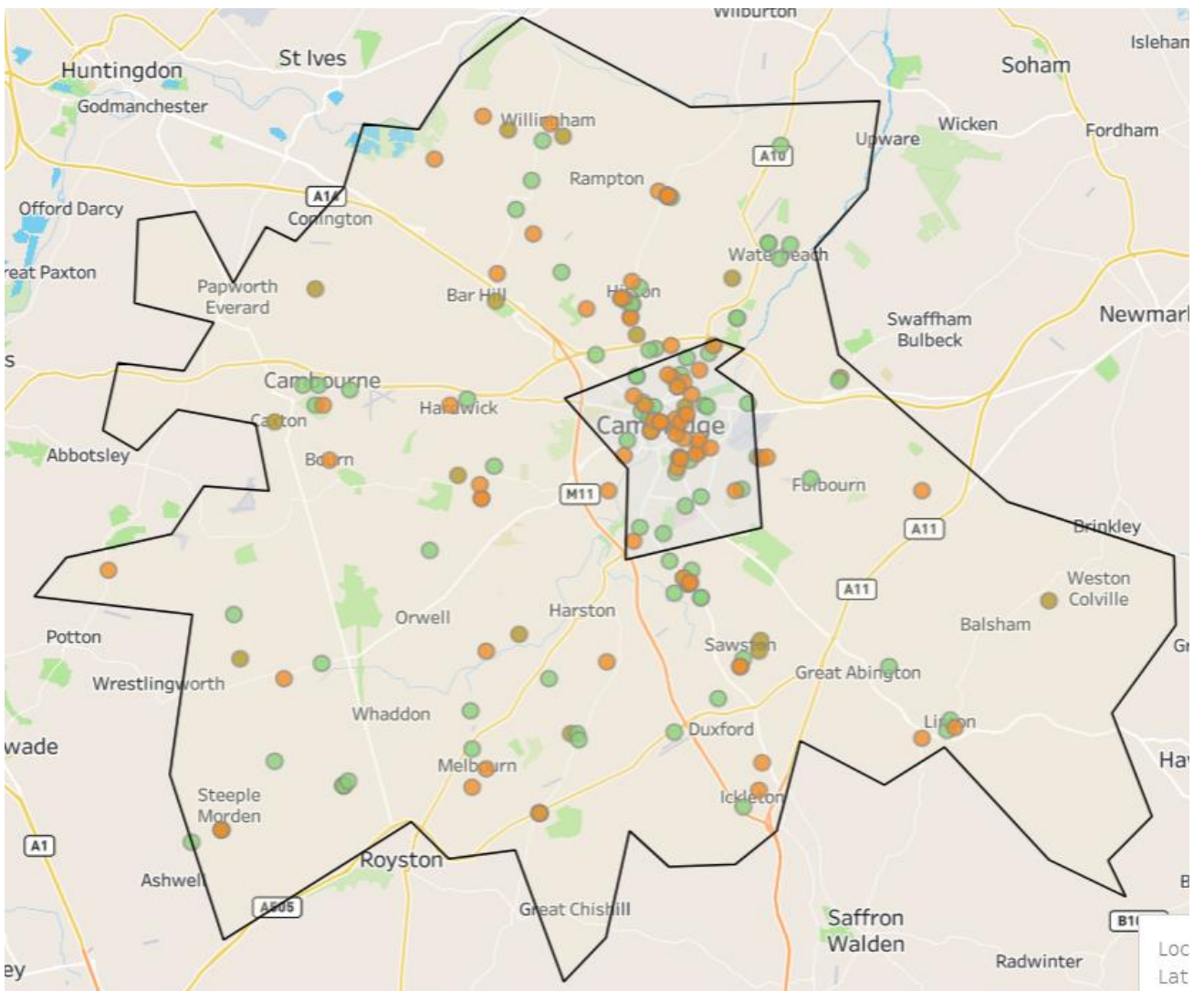
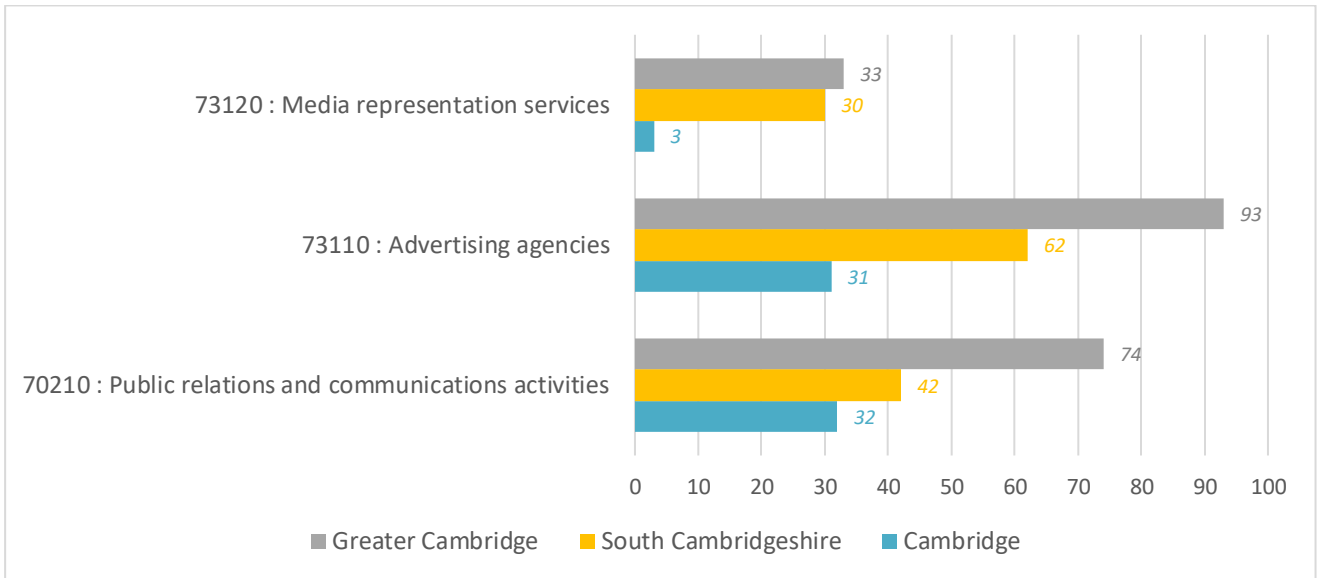


# FILM, TV, VIDEO, RADIO AND PHOTOGRAPHY: 268 creative industry businesses

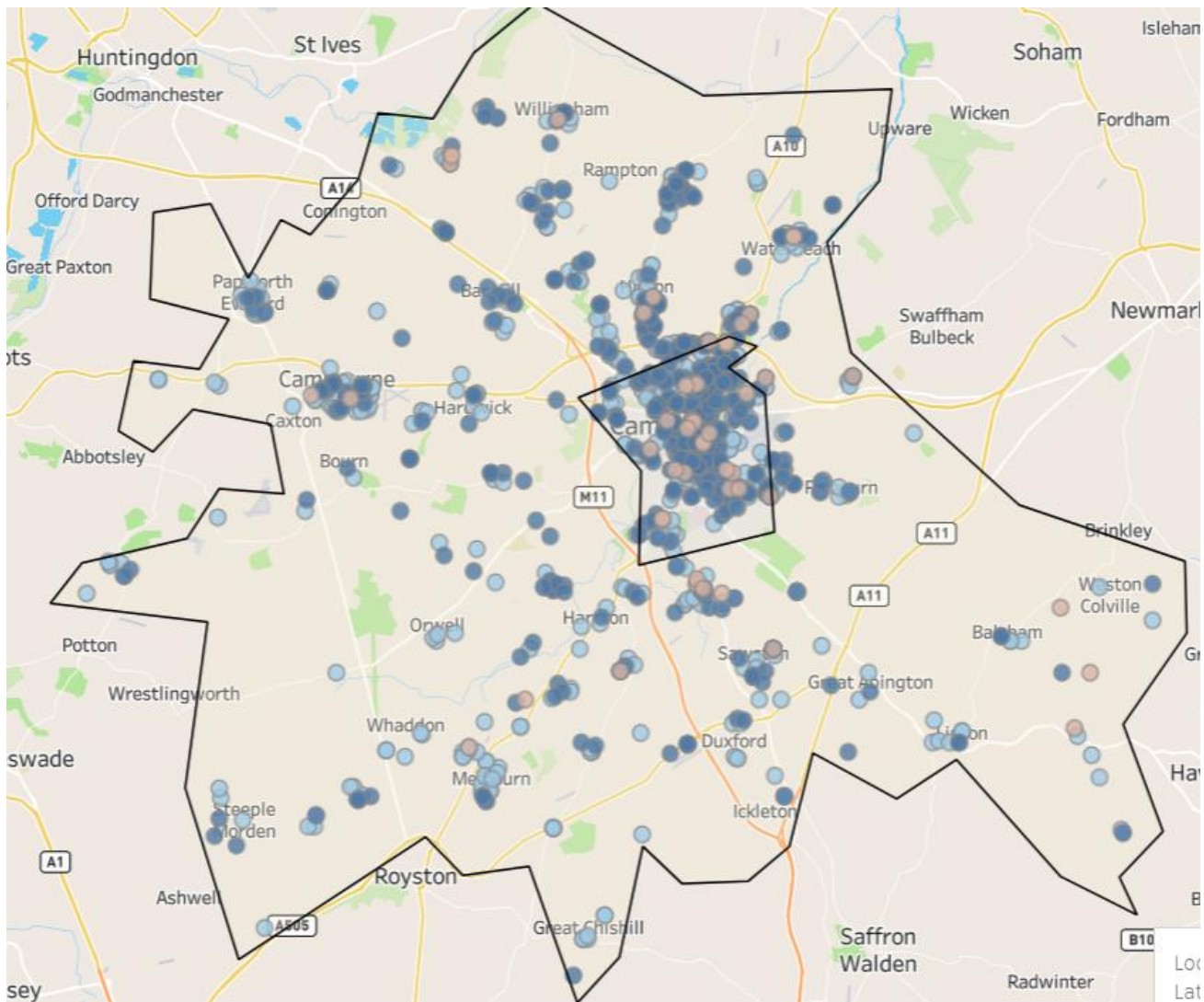
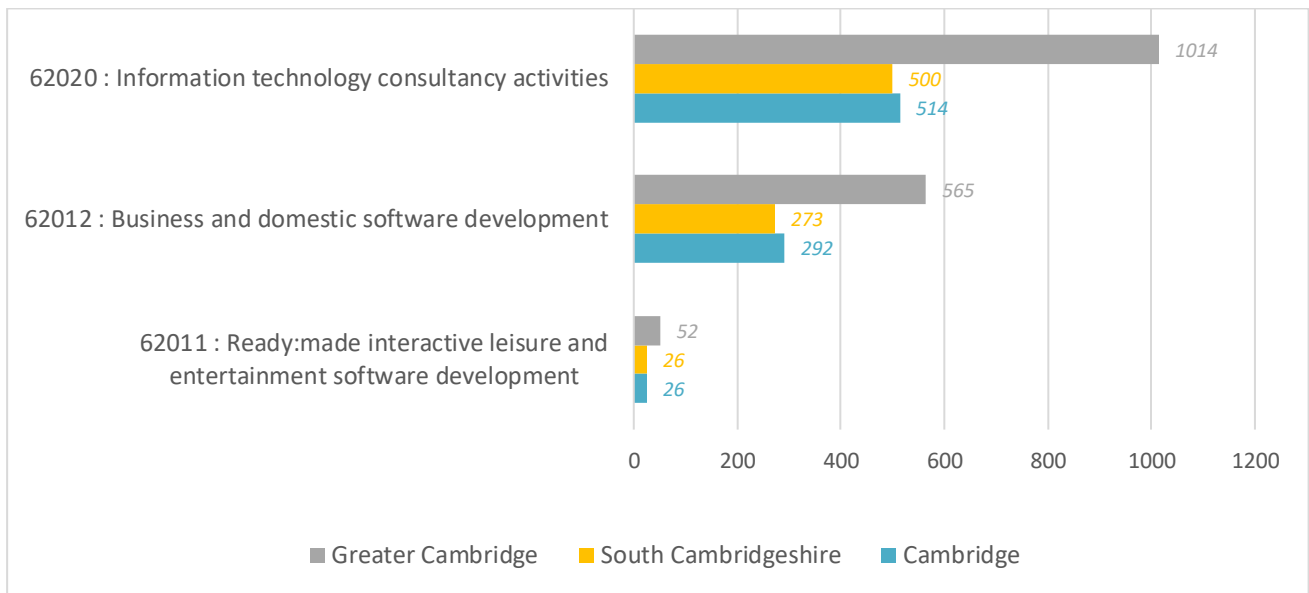




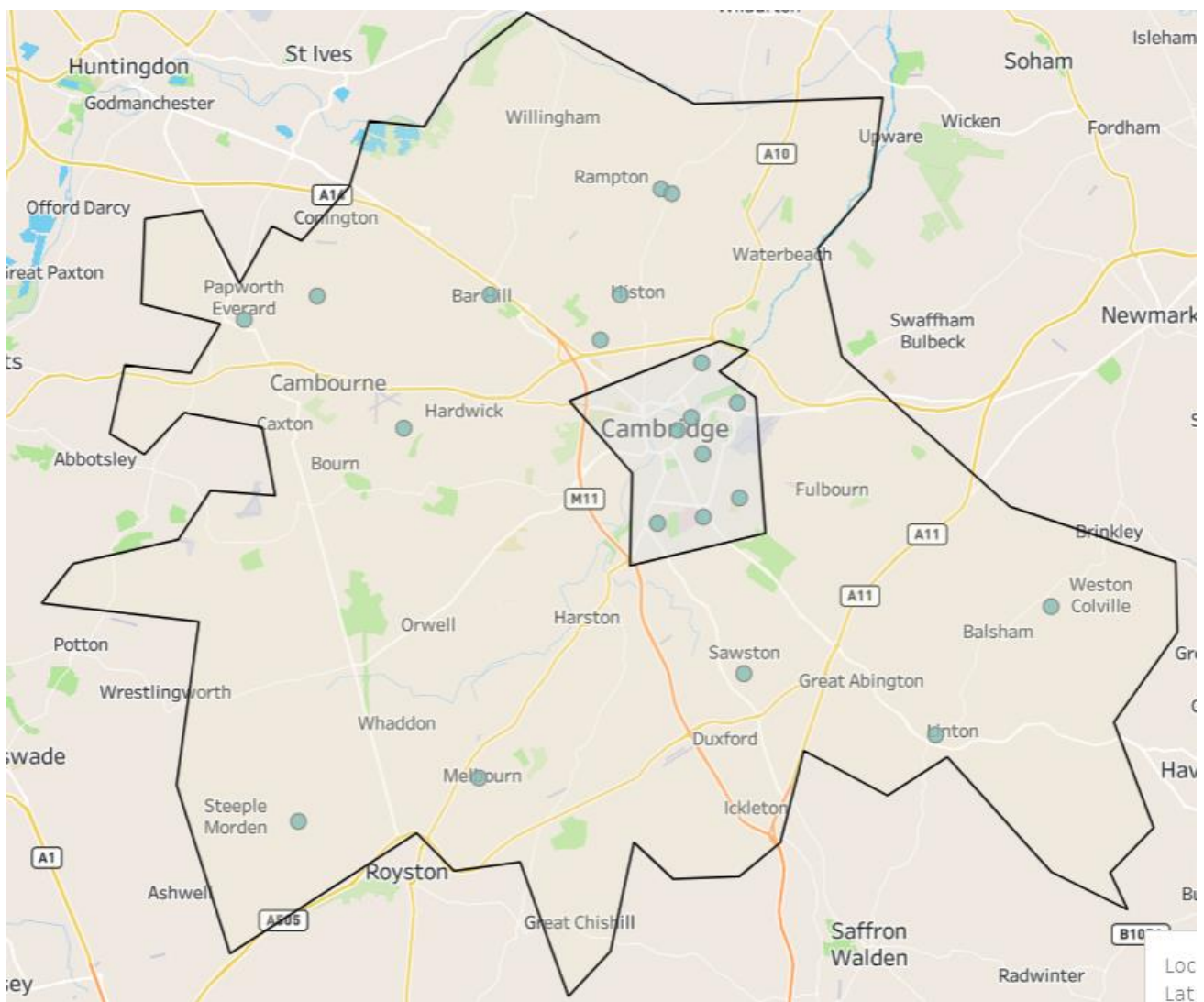
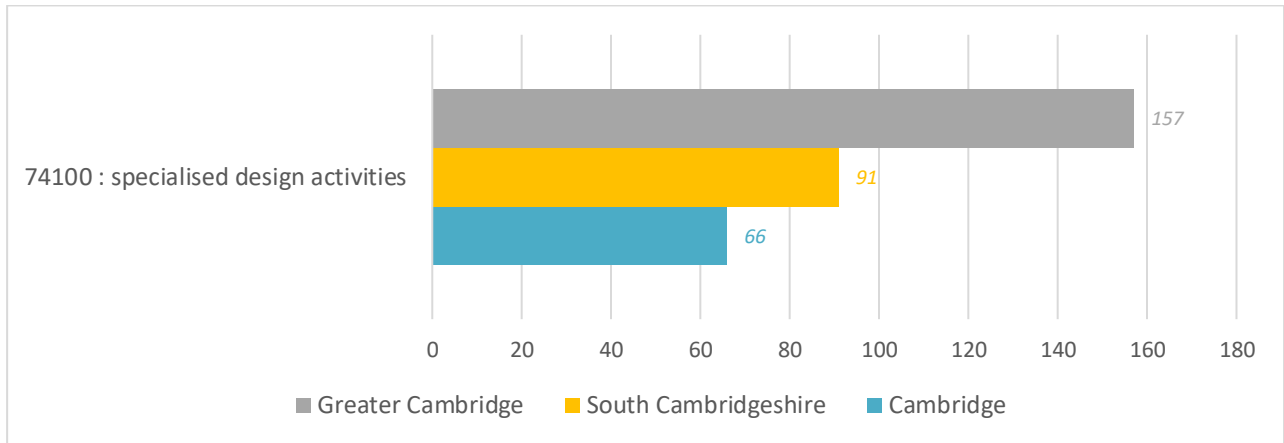
## ADVERTISING AND MARKETING: 200 creative industry businesses



# IT, SOFTWARE AND COMPUTER SERVICES: 1,631 creative industry businesses



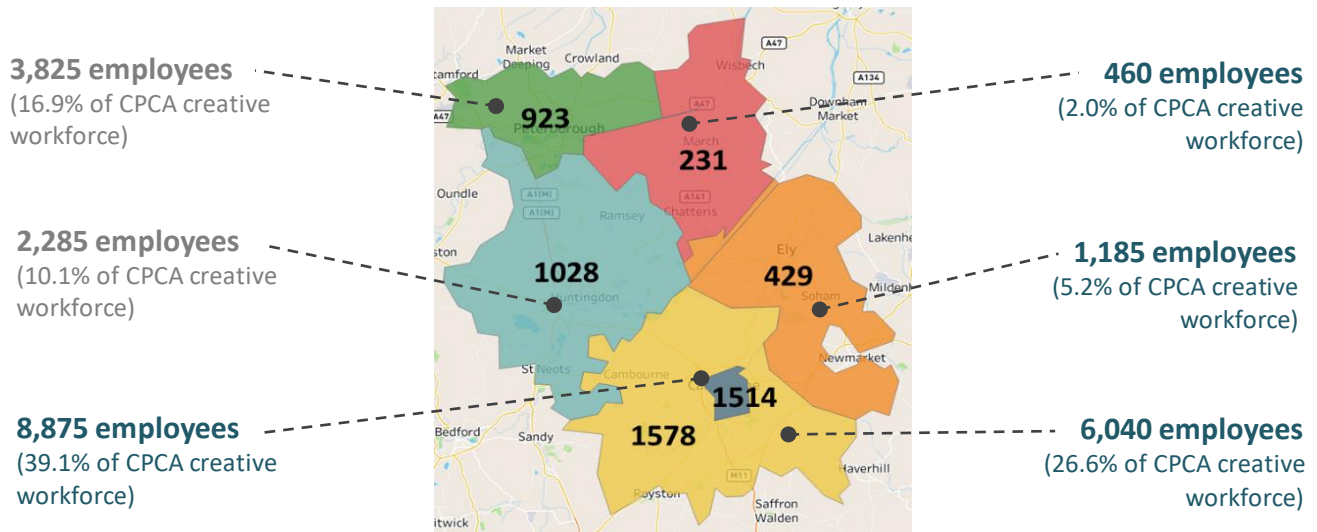
# DESIGN AND DESIGNER FASHION: 157 creative industry businesses



## Greater Cambridge creative industries workforce

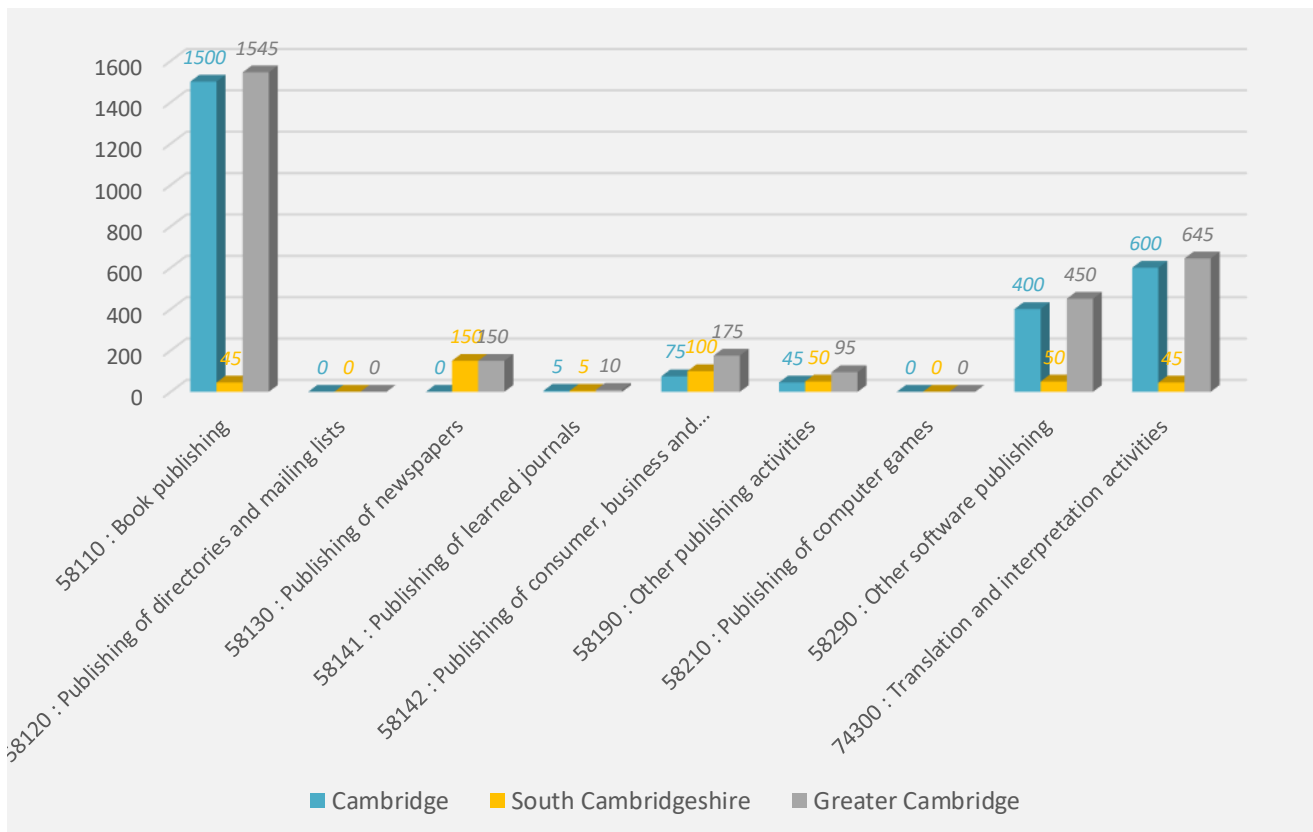
Currently, 22,670 people work in the creative industries in the CPCA area, making up 4.9% of all industries. Within this sector the top three industries are 'IT, Software and Computer Services' (55%), 'Publishing' (20%), and 'Music, Performing and Visual Arts' (7%).

### Breakdown of creative industries employment by district local authority



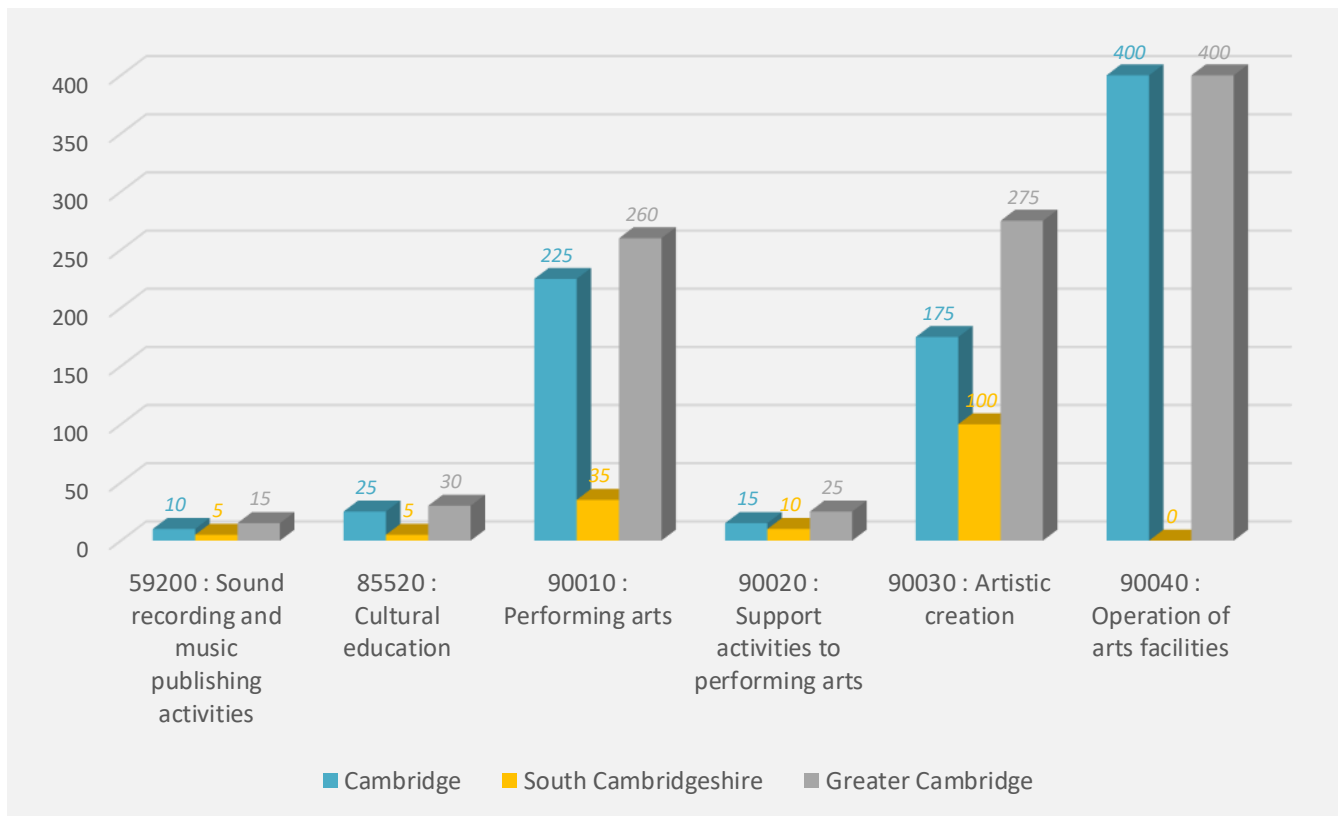
The Greater Cambridge area represents **65.7% (14,915 employees)** of all creative industries employment for the Cambridgeshire and Peterborough Combined Authority, representing 3.2% of all industries. In general, the creative industries are made up of a high frequency of small companies, where 89% of creative businesses employ fewer than five people.<sup>7</sup> On average, Greater Cambridge has **4.8 employees per business**, compared to 2.2 (Huntingdonshire), 4.1 (Peterborough), 2.0 (Fenland), and 2.8 (East Cambridgeshire).

### PUBLISHING: 3,070 employees (360 creative industry businesses)

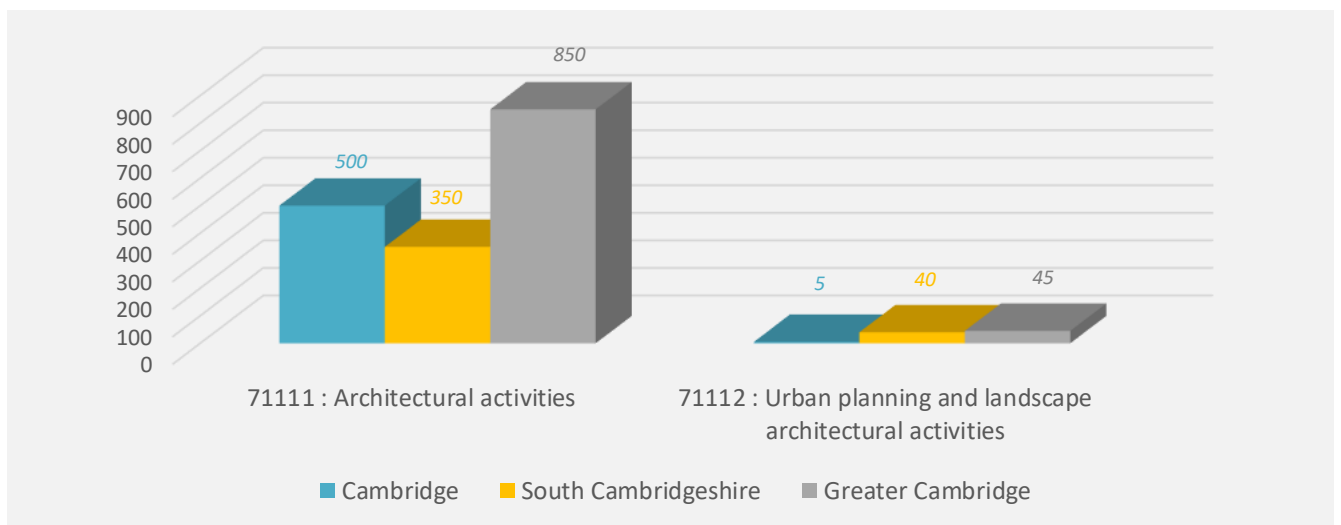


<sup>7</sup> Creative Industries Federation, 2017

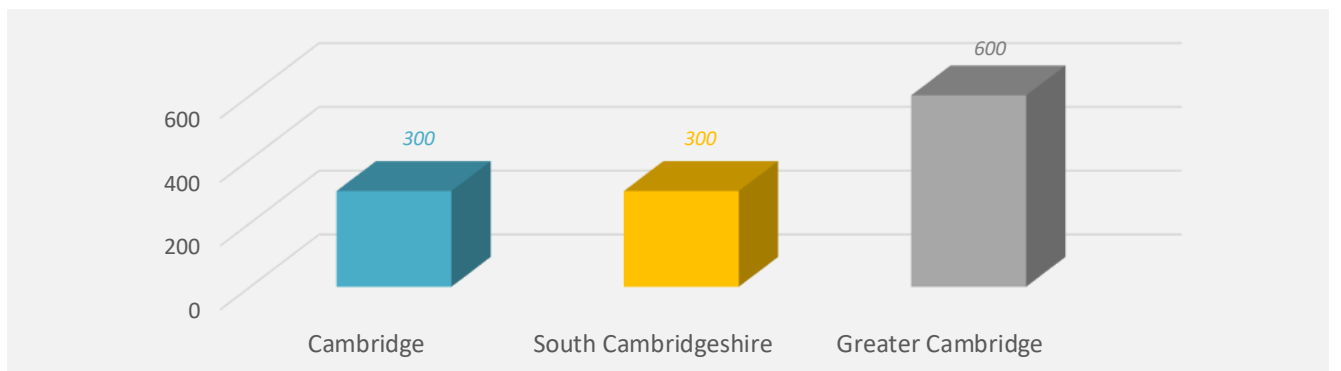
**MUSIC, PERFORMING AND VISUAL ARTS: 1,005 employees (370 creative industry businesses)**



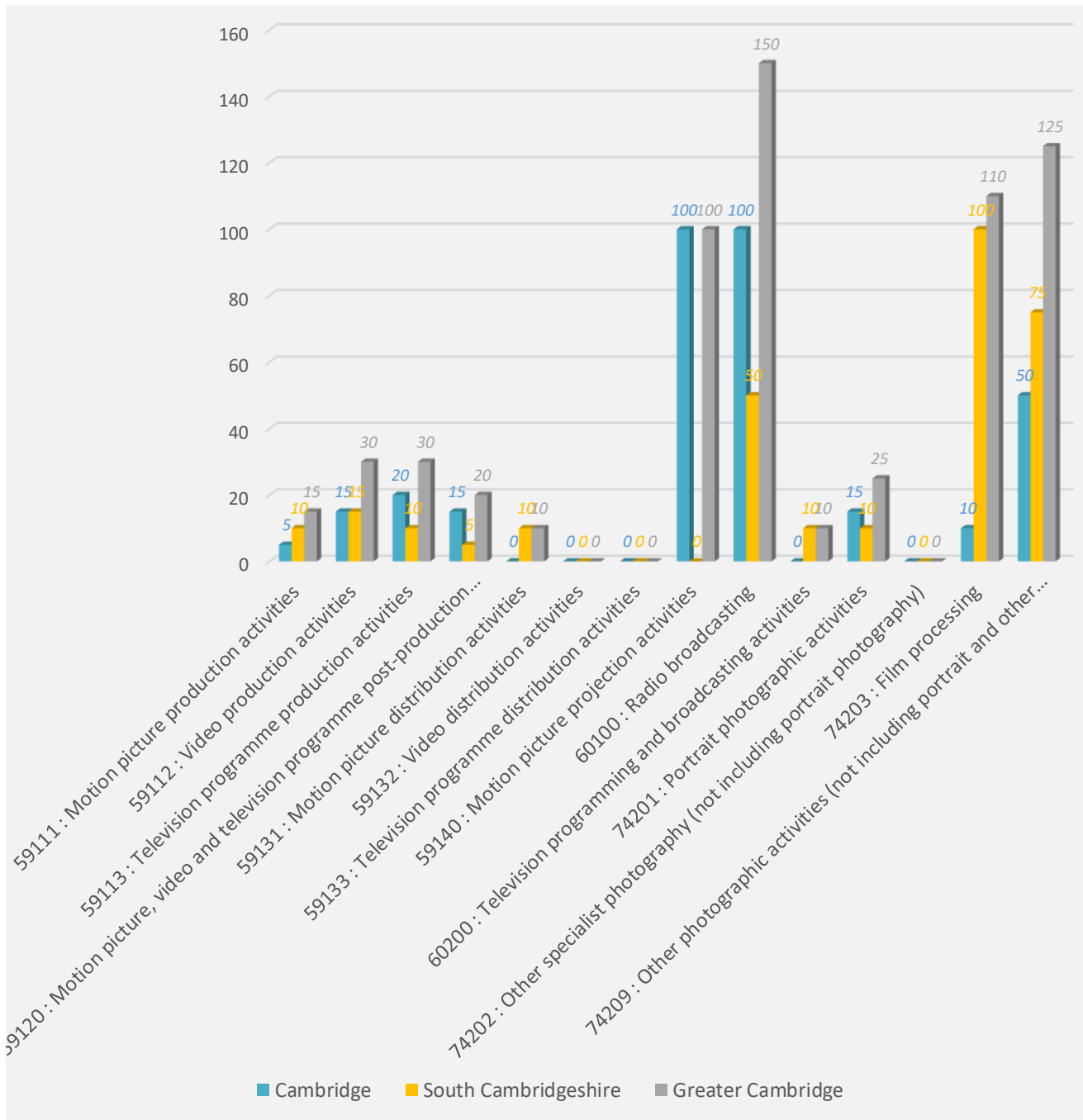
**ARCHITECTURE: 895 employees (144 creative industry businesses)**



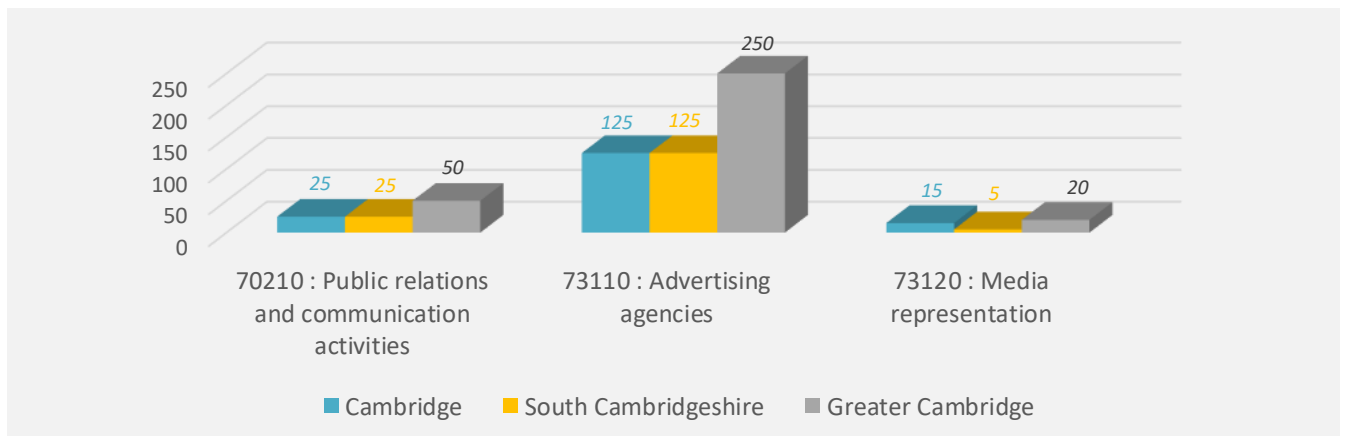
**DESIGN AND DESIGNER FASHION: 600 employees (157 creative industry businesses)**



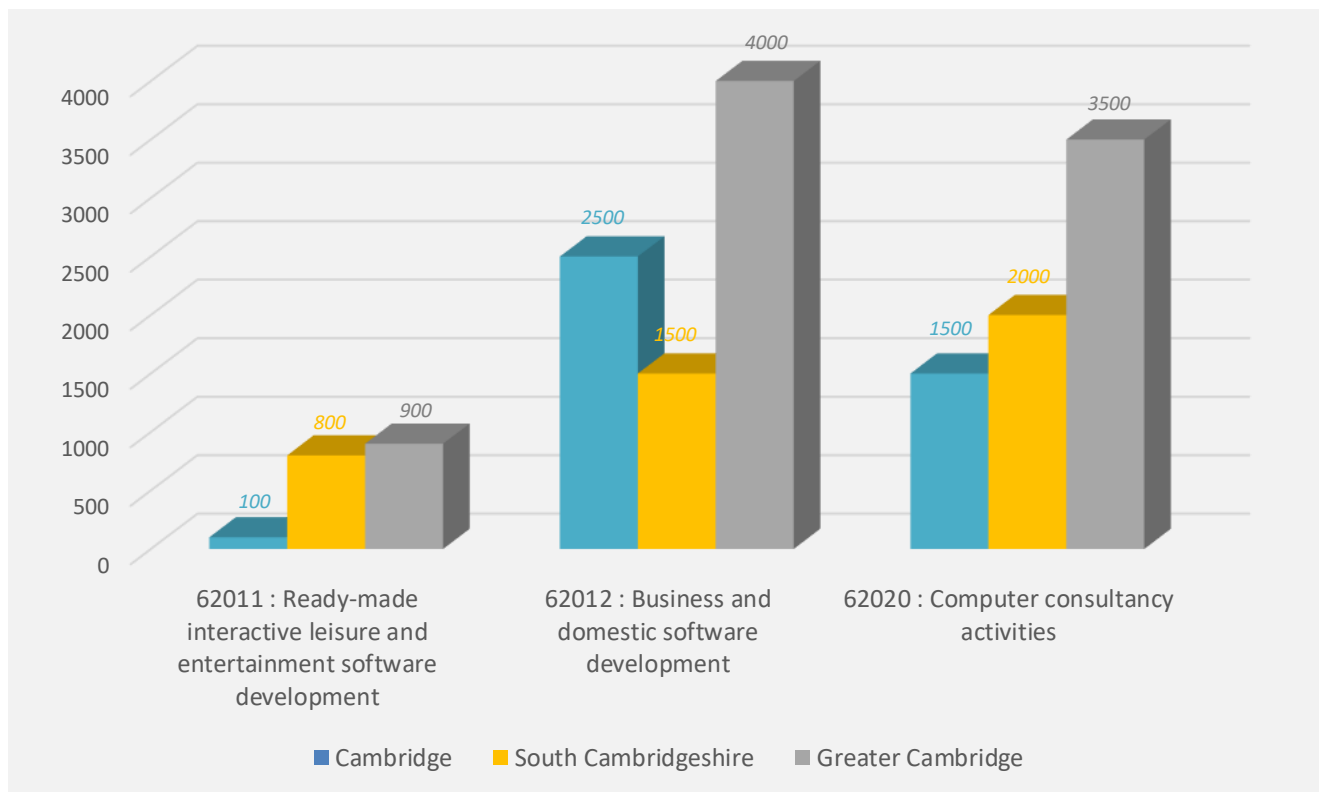
**FILM, TV, VIDEO, RADIO AND PHOTOGRAPHY: 625 employees (268 creative industry businesses)**



**ADVERTISING AND MARKETING: 320 employees (200 creative industry businesses)**

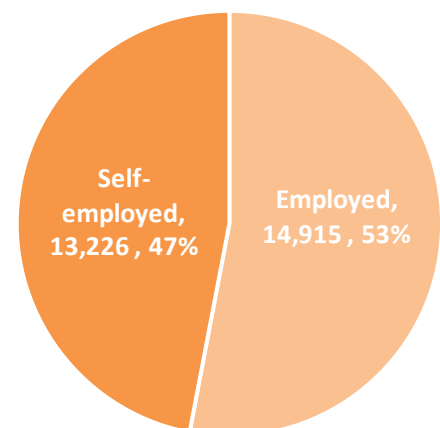


## IT, SOFTWARE AND COMPUTER SERVICES: 8,400 employees (1,631 creative industry businesses)



### Greater Cambridge creative industries self-employed versus employed workforce

However, the national average of professionals working in the creative industries who are self-employed or a freelancer that is running a business not VAT registered (e.g. part of the 'gig economy') is 47%, compared to 15% across all workforce sectors.<sup>8</sup> If we extrapolate these figures we can estimate that there is an **additional 13,226 who are self-employed, equalling an approximate total of 28,141 for the Greater Cambridge area.**



### Creative work versus creative industries

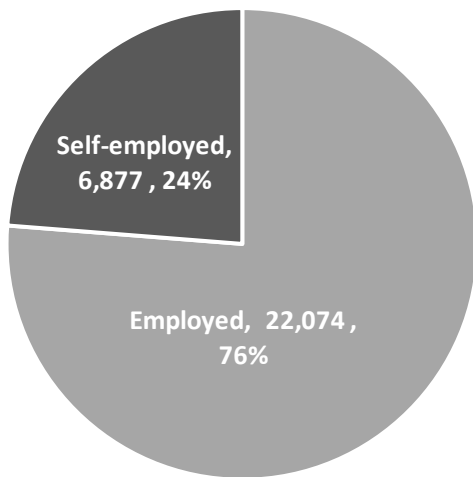
There is also a significant number of freelance creative workers in other sectors (not included within the creative industries), which on average is 23% of the workforce.<sup>9</sup> The *creative industries* are a subsection of the economy based on activities that have their origin in individual creative skills, creating wealth from the generation and exploitation of intellectual property. Whereas *creative work* is a separate yet overlapping subsection of the economy which includes roles that use creative skills in non-creative industries. Examples of creative occupations are graphic designers, artists, programmers and software development professionals. Acquiring creative skills increases chances of employment in both creative and non-creative industries, and more clearly demonstrates the demand for creative skills.

<sup>8</sup> Creative Freelancers, Creative Industries Federation 2017

<sup>9</sup> DCMS data available from: [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/564568/DCMS\\_Sectors\\_Economic\\_Estimates\\_Employment\\_Occupations.xlsx](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/564568/DCMS_Sectors_Economic_Estimates_Employment_Occupations.xlsx)

### Creative occupations outside the creative industries

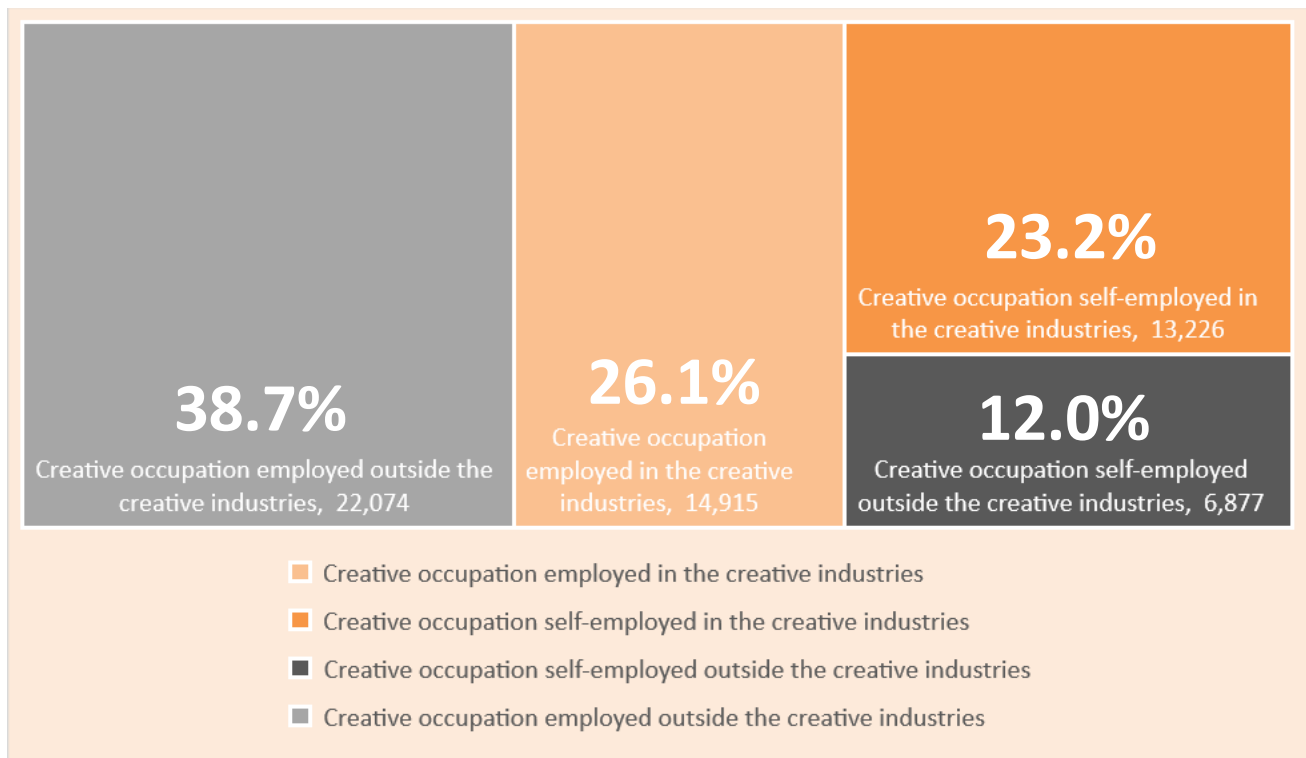
The latest DCMS data (2018) demonstrates that those either employed or self-employed in a creative role outside of the creative industries represents more than half the total number of creative occupations.<sup>10</sup>



By extrapolating the national statistic, we can estimate that there is a strong likelihood of **an additional 28,951 employed or self-employed with a creative occupation recognised by the DCMS in the Greater Cambridge area**. There is a notable difference in the number of those who are self-employed in an industry outside of the creative industries, compared to those working for a creative business (24:47%).

### All creative occupations in Greater Cambridge

The total number of people employed in a creative occupation is therefore potentially **significantly higher than 14,915 in the Greater Cambridge area, with evidence suggesting the actual figure is closer to 57,092 employed in a creative role:**



### Illustrative example of businesses who employ creative occupations within Greater Cambridge

ONS data related to the number of employees in creative occupations (e.g. designer) is only available at the regional level (East of England). However, it is possible to illustrate the number of businesses who employ designers, by both the creative industries and all industries. It is important to note that this data is based on the actual number and range of businesses in Greater Cambridge (across all sectors), and uses a labour market information tool to determine which businesses are most likely to employ someone in a specific creative occupation.

The example below focusses on industries where designers are employed: graphic designers (SOC code 3421) and product, clothing and related designers (SOC code 3422).

<sup>10</sup> This data is only available for the UK and cannot be analysed for the CPCA area.



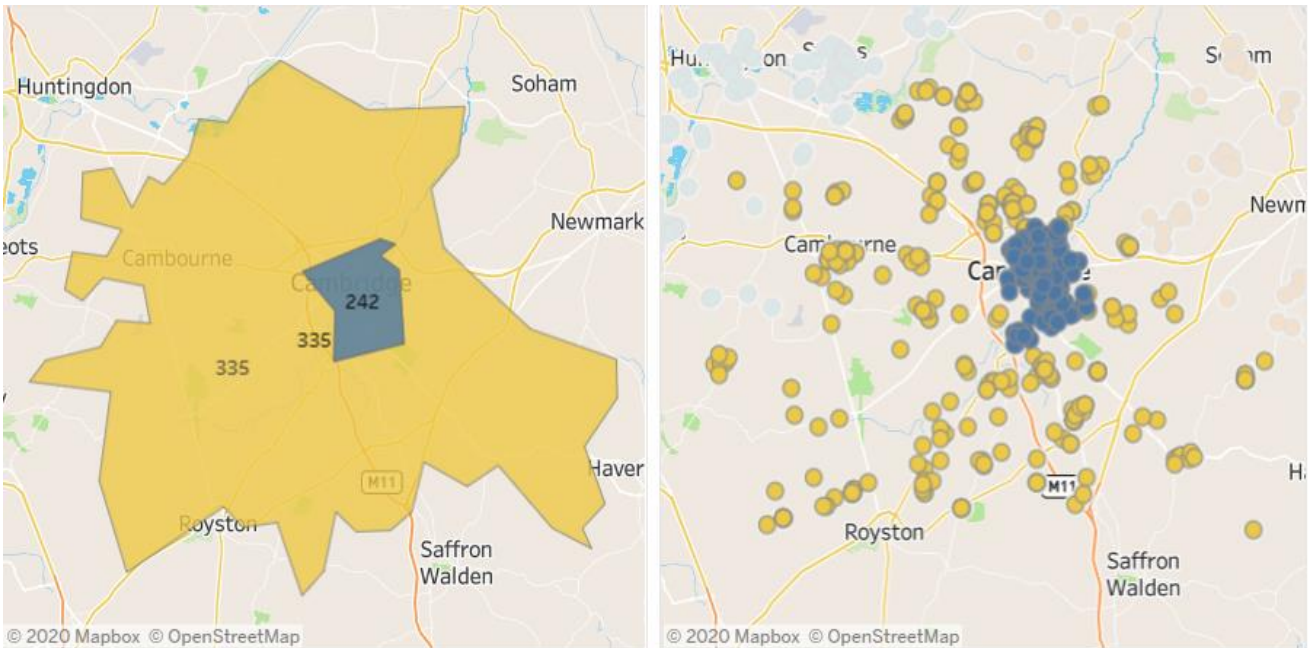


Fig x: creative industries businesses that employ SOC code 3421 and 3422

The total number of creative businesses likely to hire someone in a design role in the Greater Cambridge area is 577. The top recruiting sectors are specialised design, advertising, architectural and public relations and communications. However, according to labour market information, there are **a total of 12,765 businesses across all industry sectors that are likely to hire someone with design related skills**. The top industries are banking and finance, distribution, hotels and retail, manufacturing and transport and communication.

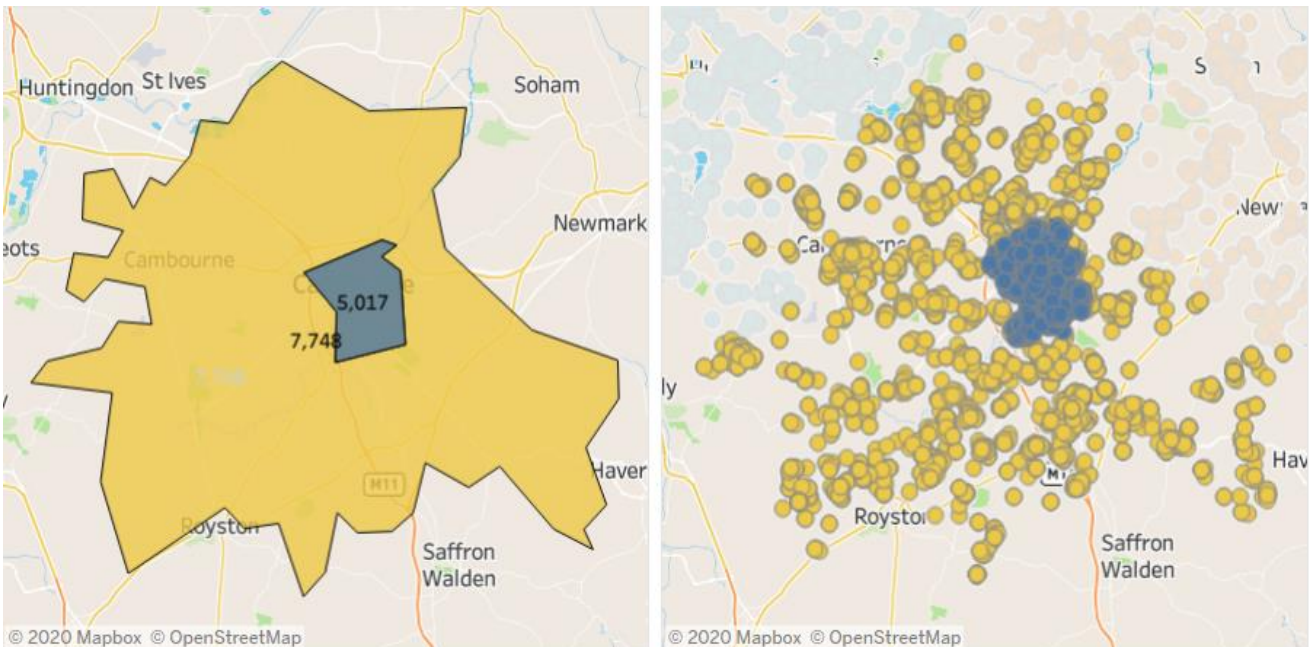


Fig x: all industries and businesses that employ SOC code 3421 and 3422

## Impact of Covid-19

The current crisis has had a negative impact on all industries and economic sectors. However, during the pandemic, the cultural and creative ecosystem has demonstrated its vital role in promoting wellbeing and social cohesion and opening new potential market opportunities through digital access. Gaming and digital content creation have come to the fore, if not thrived during lockdown, while cultural institutions and performance venues have been much harder hit.

The longer-term impact of Covid-19 on the creative industries is still being assessed nationally, and Cambridge City Council are reaching out to cultural organisations to better understand the local position. **The closest comparator is the economic crisis of 2008, where despite the financial impact of the recession, the creative industries grew by 43.2% between 2010 and 2018.**<sup>11</sup>

### Sectors most at risk

The sectors most impacted by Covid-19 include performing arts, support activities to performing arts, artistic creation, operation of arts facilities and cultural education. For the Greater Cambridge area this equates to **325 creative businesses and combined represents 11% of all businesses within the creative industries.**

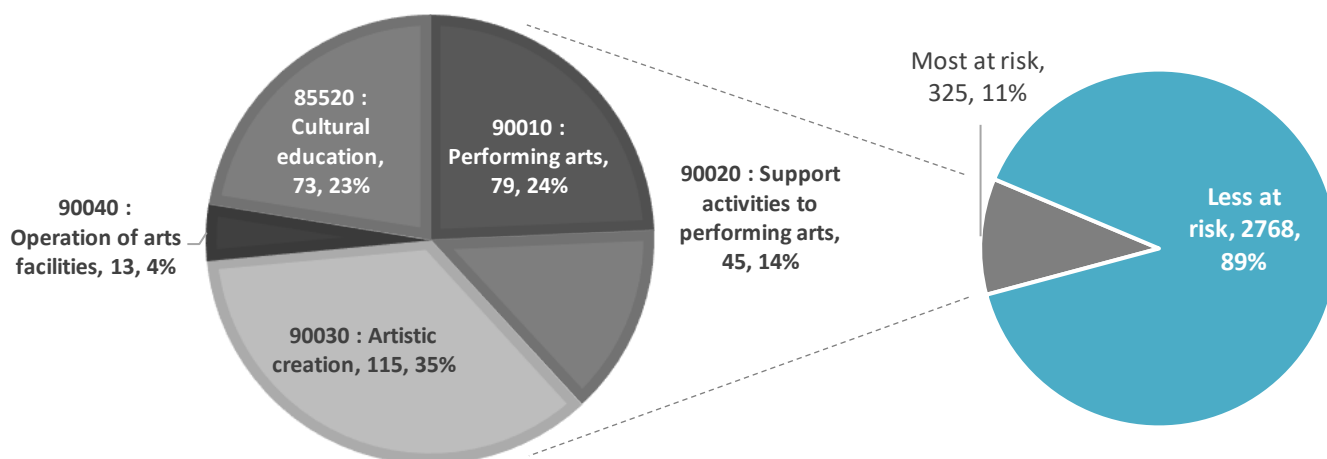


Fig 1: Proportion of creative businesses least and most at risk due to Covid-19 in Greater Cambridge

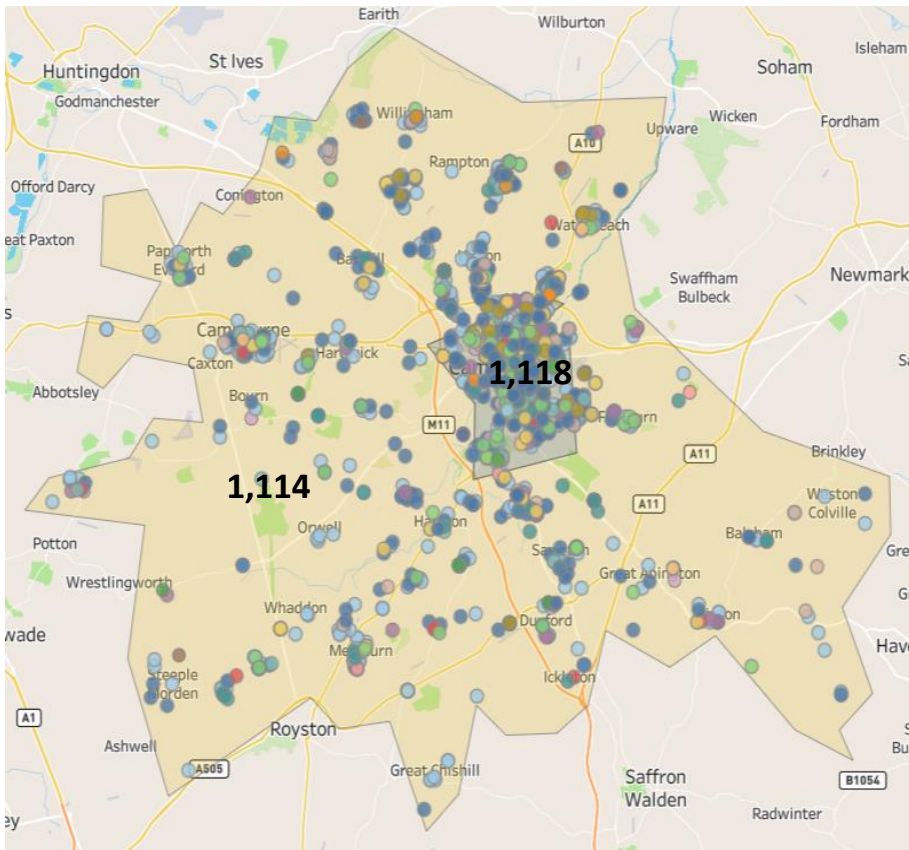
While it is a relatively small percentage of all creative businesses that are most at risk, the importance of those sectors most closely aligned to the music, performing and visual arts can not be understated. They have a **vital and strategic role in relation to cultural placemaking, social and community cohesion.**

### Greater Cambridge digital economy

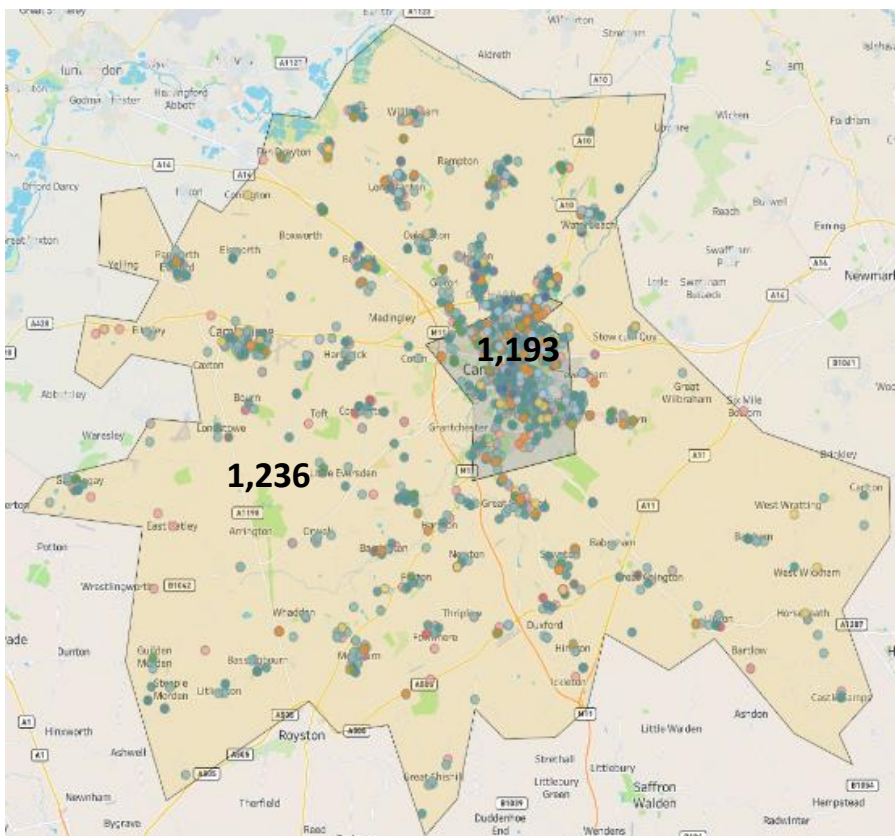
The unique make-up of the creative industries in Greater Cambridge means it is well placed to sustain future growth both during and post-pandemic. Digital platforms, immersive content and digital distribution have all gained significant traction during Covid-19 and represent areas of economic strength and resilience to the negative impact of Covid-19:

<sup>11</sup> DCMS sectors economic estimates 2018 (provisional): GVA, 5 February 2020

## DCMS digital sector businesses in Greater Cambridge

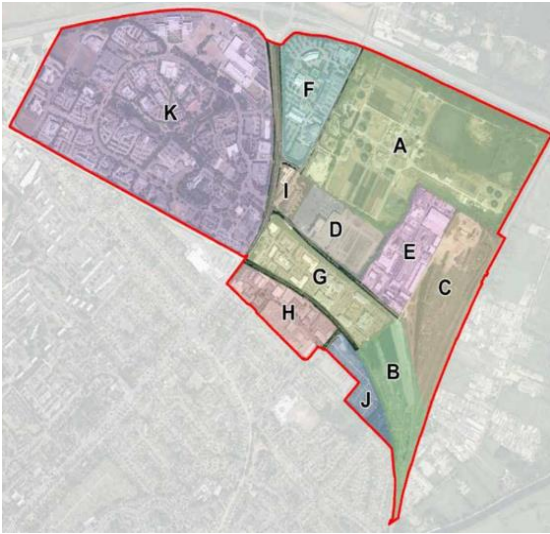


## Tech Nation sector businesses in Greater Cambridge<sup>12</sup>



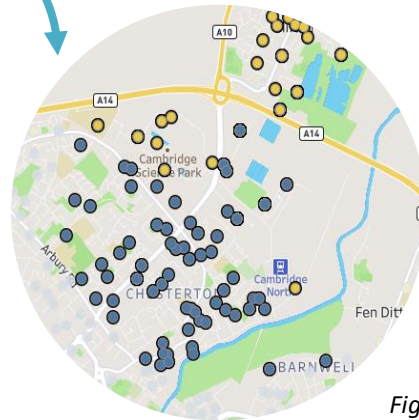
<sup>12</sup> Tech Nation uses an alternate interpretation of the creative industries to the DCMS. It includes telecommunications and the manufacture of computer equipment.

**New settlement example: creative businesses bordering with the North East Cambridge Area Action Plan boundary**



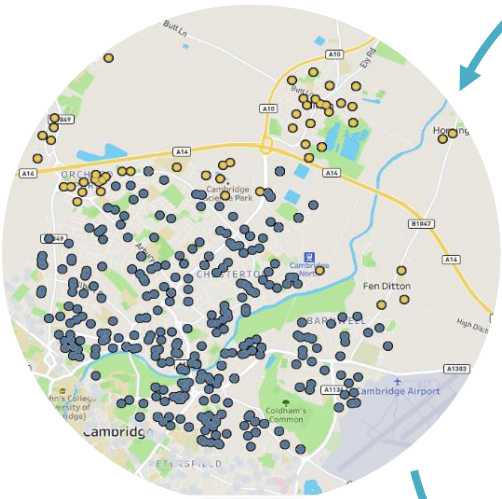
*Fig 5: North East Cambridge Area Action Plan boundary*

**282 creative businesses within a one-mile radius of NEC AAP**



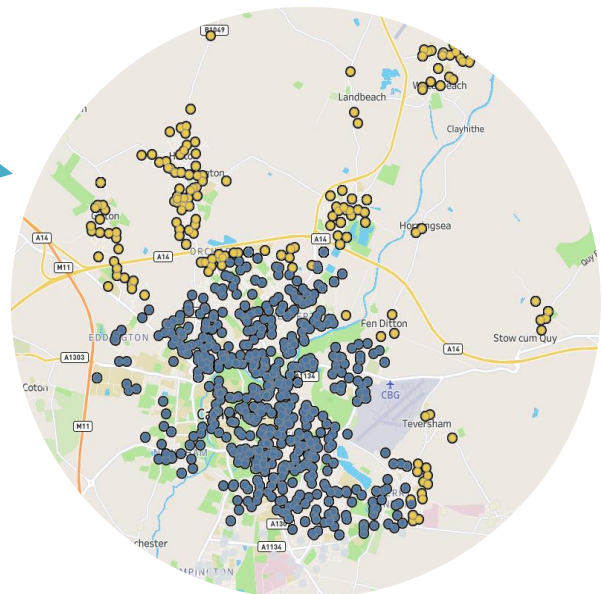
*Fig 6: Creative businesses within 1 mile of the NEC AAP*

**780 creative businesses within a two-mile radius of NEC AAP**



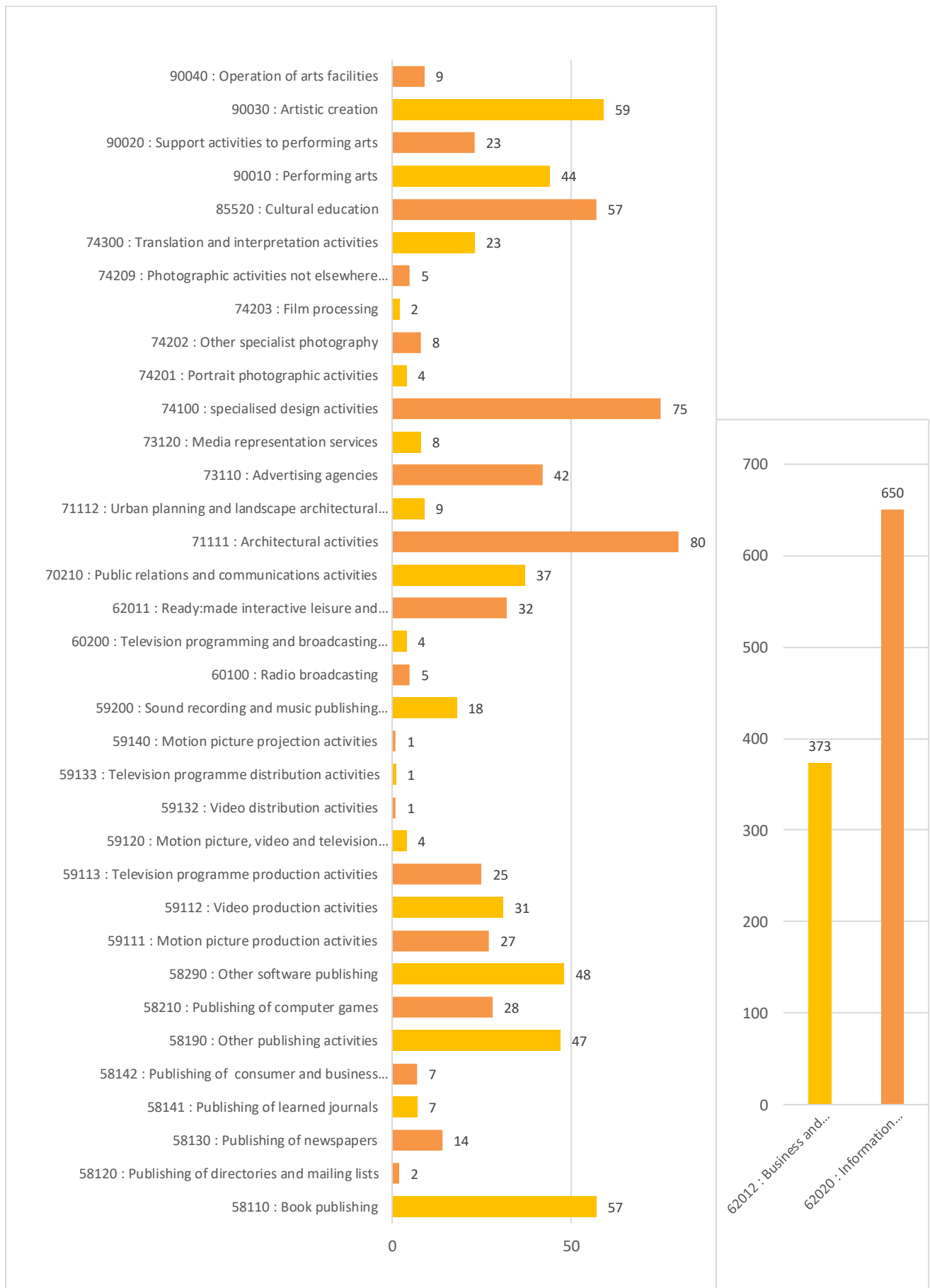
*Fig 7: Creative businesses within 2 miles of the NEC AAP*

**1,831 creative businesses within a 3.5-mile radius of NEC AAP**



*Fig 7: Creative businesses within 3.5 miles of the NEC AAP*

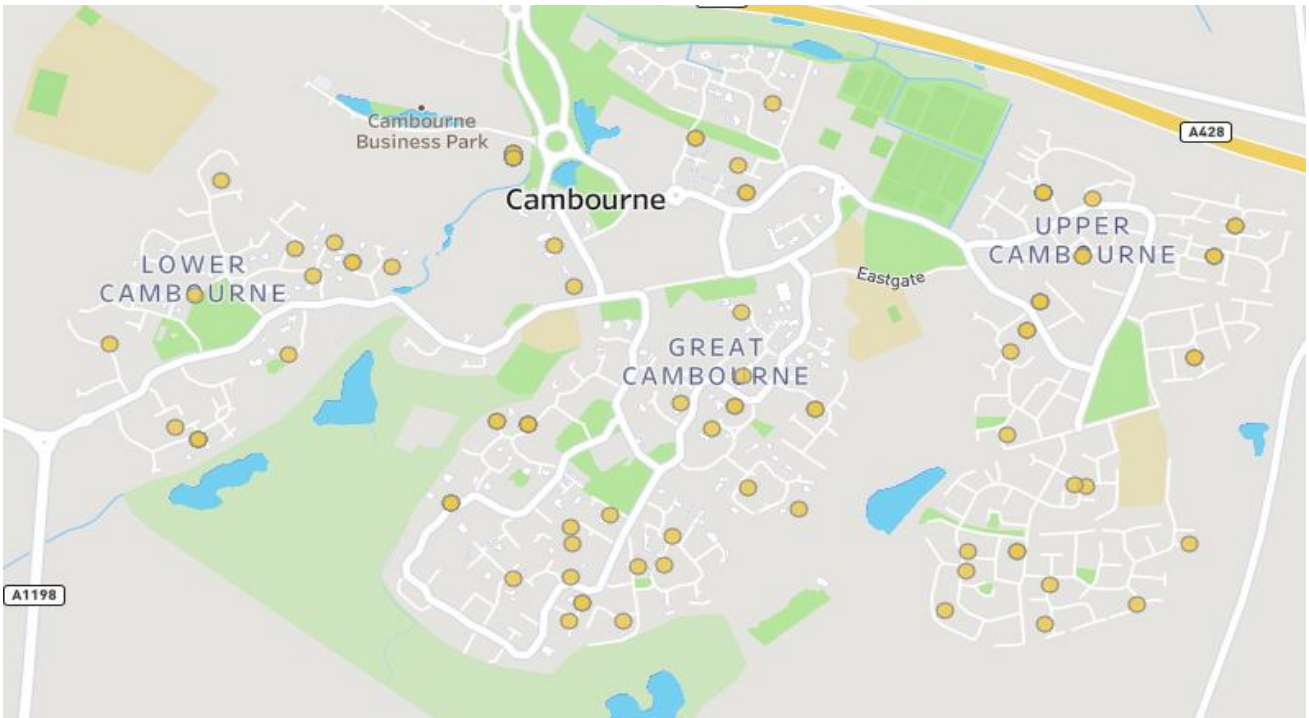
Composition of creative businesses within 3.5 miles of the North East Cambridge Area Action Plan



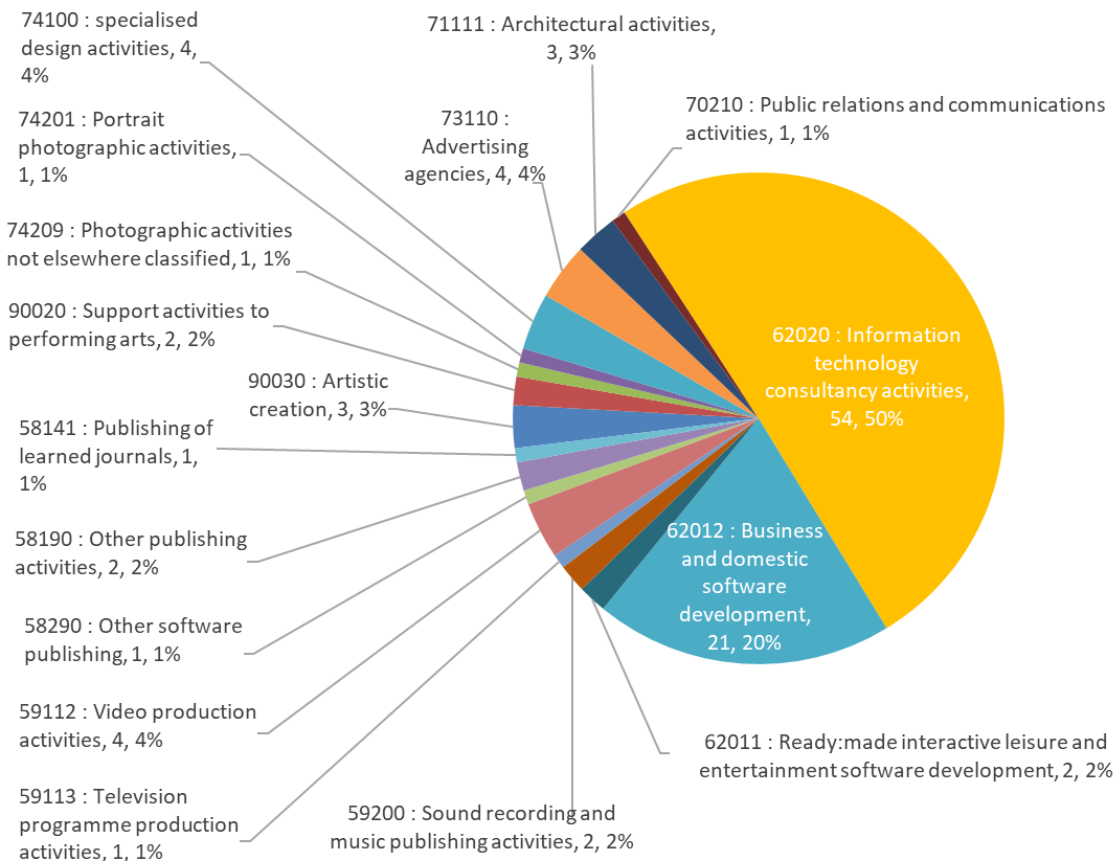
### Example creative industries cluster: Cambourne

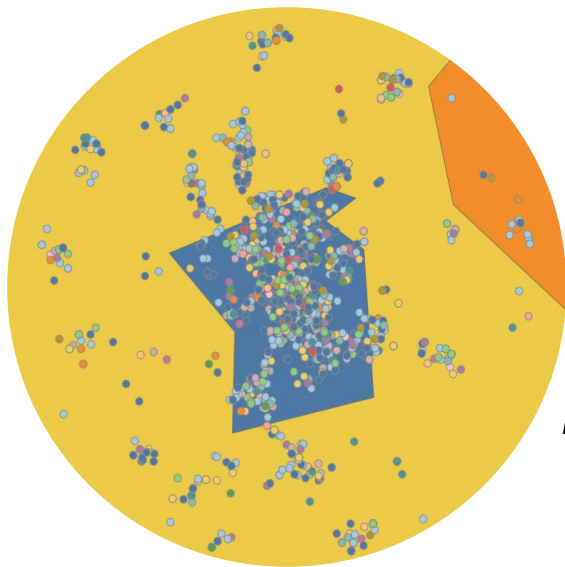
A significant cluster area exists within Cambourne, approximately 9.5 miles from the centre of Cambridge, representing 107 businesses which primarily consists of businesses categorised as information technology and software development (70%):

*Location map of Cambourne based creative businesses (107)*



*Composition of Cambourne based creative businesses (107)*





### **Creative businesses within a six-mile radius of the centre of Cambridge**

There are **2,368** creative businesses registered with Companies House within a six-mile radius of the centre of Cambridge, with **831** of these located within South Cambridgeshire (53% of all SCDC creative businesses are in close proximity to Cambridge City).

*Fig 2: Creative businesses within a 6-mile radius of the centre of Cambridge*

*To add*

*Further cluster examples*

*Further new settlement examples*

*Travel to Work Areas – average, high and low qualification*

*Creative skills pathways*