West of England cultural sector economic summary

February 2022

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Culture in the West of England

The West of England is a vibrant, diverse and creative region. It includes the two thriving cities of Bristol and Bath along with diverse towns and communities. As a whole, it is well-recognised as a national and international cultural and tourist hot spot, with a vibrant mix of urban, rural and coastal areas providing an exceptionally diverse cultural ecology.

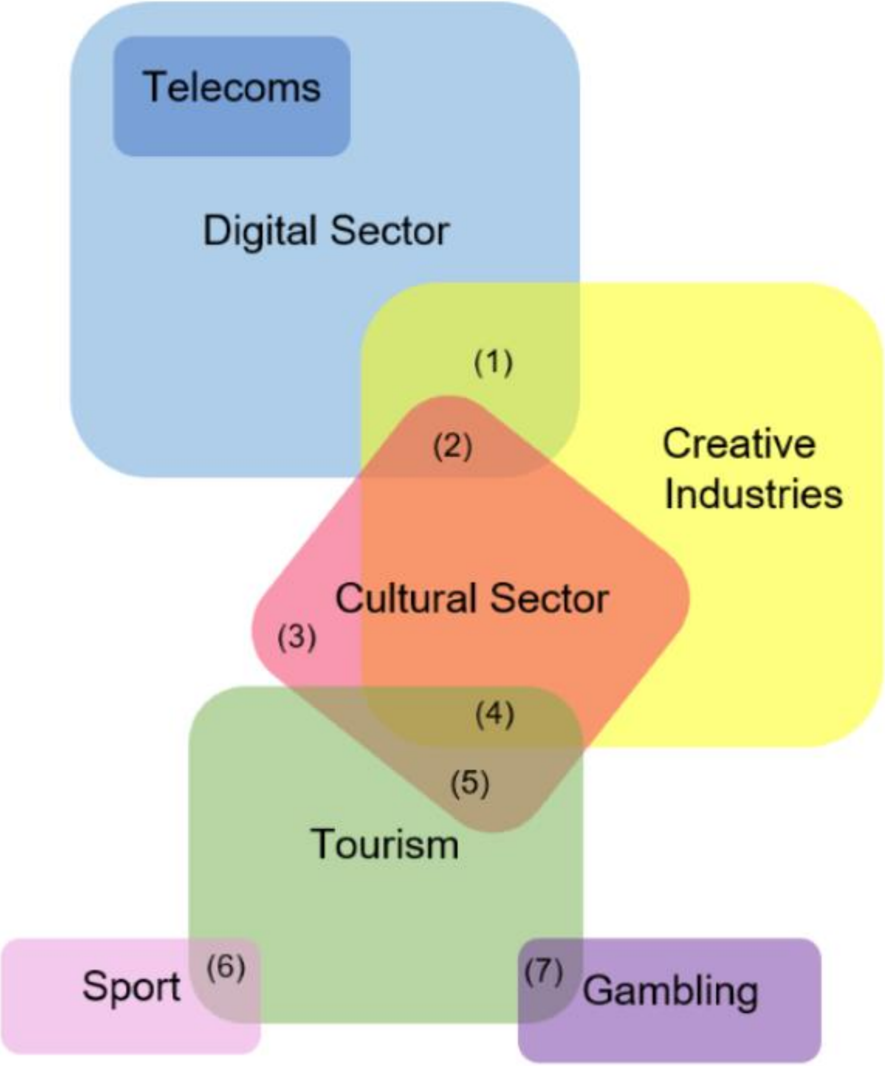
Cultural, digital and creative industries employ 50,000 people in the West of England, across almost 7,000 businesses. And these cultural offer and assets are also pivotal in contributing to a sense of place around which people build a sense of community.

They act as a draw for residents, businesses and visitors alike; covering a broad range of facilities and activities such as cinemas, theatres, restaurants, festivals, museums, historical sits, and public open spaces.

Sector classifications

Department for Media, Culture, and Sport (DCMS) classify the sectors for which they are responsible by grouping industries together. A significant number of industries fall into more than one of these sectors.

Here, we will focus on the Cultural, Creative, and Digital sectors as defined by DCMS. [More detail is available here.]



Source: DCMS

(1) Publishing, computer games, software publishing, computer programming, computer consultancy activities
(2) Film, TV, Music, Radio
(3) Heritage, retail of music and video recordings, manufacture of musical instruments, reproduction of recorded media
(4) Arts, Museum activities
(5) Heritage
(6) Renting of sports goods, operation of sports facilities, other sport activities
(7) Gambling

Note: Civil Society has not been depicted in this figure because it spans across all industries, both within DCMS sectors and outside. The overlap between Civil Society and other DCMS sectors is taken into account for All DCMS totals (mainly SIC 90 – Arts, which overlaps with Creative Industries, Cultural Sector and Tourism sector).

Overview: Cultural, Creative, and Digital

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Industry business information

	Employment (2020)		Business Count (2021)		GVA (2018)	
	Number	% WofE total	Small/micro	All	£(m)	%
Cultural Sector	9,000	1.4	1,625	1,640	354.7	1.4
Creative Industries	36,000	5.7	5,875	5,940	1,285.8	4.9
Digital Sector	39,000	6.2	4,465	4,730	1,552.9	5.9
Cultural, creative, and digital sectors combined	***50,000***	***7.9***	***6,880***	***6,965***	***1,957.6***	***7.5***

- There is significant overlap between the cultural, creative, and digital sectors as defined by DCMS (see p4). As a result, statistics on the sectors combined are less than the sum of each individual sector. As relatively new and fast-growing sectors, creative and digital are not well represented by SIC codes – the method used by ONS and other organisations to collate data on industries.
- Regional employment in organisations operating in one or more of these sectors is 23% higher than the national level (6.4%).
- However, the proportion of regional GVA that the sectors represent is 20% lower than the proportion of national GVA (9.4%). This is largely due to high-productivity computing and advertising jobs in London and the South East – the cultural, creative, and digital sectors account for a higher proportion of GVA in the West of England than in any of the other regions, including the South West.

Sources: ONS, Business Register & Employment Survey. ONS, UK Business Counts. Emsi, Industry Table.

Cultural sub-sector

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Industry business information

	Employment (2020)		Business Count (2021)		GVA (2018)	
	Number	% WofE total	Small/micro	All	£(m)	%
Arts, crafts, and performing arts	2,250	0.4	610	615	77.2	0.3
Media incl. film and TV, radio, photography, and music	5,000	0.8	960	970	238.0	0.9
Museums, libraries, historical sites, other cultural assets incl. education	1,250	0.2	55	60	39.6	0.2
Total	*9,000*	*1.4*	*1,625*	*1,640*	*354.7*	*1.4*

- We can identify specialisms within the region by comparing the level of regional employment to the national picture, to calculate location quotients (LQs).
- The media industry is a local specialism within the cultural sector. Employment in film, TV, radio, photography, and music is 26% higher in the West of England than it is nationally (0.6%).
- However, employment in museums and other cultural assets is 20% lower regionally than the national level. This seems to primarily be driven by the fact that people are employed in the library/archive and cultural education industries in the West of England at just one third of the rate compared to nationally.

Sources: ONS, Business Register & Employment Survey. ONS, UK Business Counts. Emsi, Industry Table.

Creative industries

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Industry business information

	Employment (2020)		Business Count (2021)		GVA (2018)	
	Number	% WofE total	Small/micro	All	£(m)	%
Advertising and marketing	2250	0.4	505	515	142.3	0.5
Architecture, crafts, and design	4,000	0.6	840	850	137.7	0.5
IT, software, and computer services	19,000	3.0	2,715	2,740	552.6	2.1
Media incl. film and TV, radio, and photography	4,500	0.7	840	845	226.5	0.9
Museums and libraries	900	0.1	20	25	28.8	0.1
Music, performing, and art	2,500	0.4	700	705	84.1	0.3
Publishing	3,000	0.5	255	260	113.8	0.4
Total	*36,000*	*5.7*	*5,875*	*5,940*	*1,285.8*	*4.9*

- The creative industries has some significant overlap with the cultural sector, but additional industries with local employment rates exceeding national levels include: publishing (50% higher); IT and software (47% higher); and architecture, crafts, and design (28% higher).

Sources: ONS, Business Register & Employment Survey. ONS, UK Business Counts. Emsi, Industry Table.

Digital sector

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Industry business information

	Employment (2020)		Business Count (2021)		GVA (2018)	
	Number	% WofE total	Small/micro	All	£(m)	%
Computer programming, consultancy, and repair, incl. information service activities	26,000	4.1	3,210	3,350	121.1	0.5
Media incl. film and TV, radio, music	4,500	0.7	780	785	229.6	0.9
Manufacturing/wholesale of computers and electronics	1,000	0.2	95	100	839.7	3.2
Publishing incl. software	3,500	0.6	350	360	121.9	0.5
Telecommunications	4,500	0.7	130	135	240.6	0.9
Total	*39,000*	*6.2*	*4,465*	*4,730*	*1,552.9*	*5.9*

- Another local specialism is the computer programming, consulting, and repair industries, including information services. These industries together have a local employment rate 45% higher than the national employment rate (2.9%).

Sources: ONS, Business Register & Employment Survey. ONS, UK Business Counts. Emsi, Industry Table.

Job levels in cultural, creative, and digital sectors

Industry labour market information

Occupation	Employment (2021)		Median Hourly Wage (2020)[1]	Advertised Educational level (predominantly)
	Count	% change (20-21)		
Managers, Directors and Senior Officials	6,120	+1%	£19.25	Bachelors Degrees, Graduate Cert/Dip
Professional	15,976	+1%	£21.63	Bachelors Degrees, Graduate Cert/Dip
Associate Professional & Technical	11,572	+2%	£15.40	Level 4 NVQ, Level 3 NVQ
Administrative and Secretarial	3,702	-	£11.49	Level 3 NVQ, Level 2 NVQ
Skilled Trades	2,312	+1%	£12.31	Level 3 NVQ, Level 2 NVQ
Caring, Leisure and Other Service	335	-	£10.20	Level 3 NVQ, Level 2 NVQ
Sales and Customer Service	1,952	-	£9.84	Level 3 NVQ, Level 2 NVQ
Process, Plant and Machine Operatives	500	+2%	£11.85	Level 2 NVQ
Elementary occupations	1,179	+2%	£9.23	Level 2 NVQ

- Employment within the cultural, creative, and digital sectors is characterised by a high proportion of freelancers, and therefore in many cases is not adequately captured in national statistics.

(1) In Emsi data, occupational earnings are shown as an hourly rate because this figure takes other types of benefits and irregular employment patterns into consideration, e.g part-time, tips, commissions, bonuses.

Sources: Staffing Patterns, Emsi. Inverse Staffing Patterns, Emsi.

Creative occupations across the economy

Occupation labour market information

Occupation	Employment (2021)		Median Annual Wage (2020)	Advertised Educational level (predominantly)
	Count	% change (20-21)		
Creative Managers, Directors and Senior Officials	7,740	+2%	£65,890	Honours, Bachelors Degrees
Creative Professional	16,284	+2%	£37,379	Bachelors Degrees, Graduate Cert/Dip
Creative Associate Prof & Tech	11,728	+2%	£27,135	Level 4 NVQ, Level 3 NVQ
Creative Skilled Trades	941	+1%	£30,376	Level 3 NVQ, Level 2 NVQ
Total	*36,693*	*+2%*	*£39,939*	-

- DCMS and ONS have defined a set of occupations (using SOC codes) as 'creative occupations'. This refers to individual job titles rather than the industry a business operates in as in previous slides.
- This captures creative roles (including digital roles) within organisations that do not themselves operate within the cultural, creative, or digital sectors, such as programmers, marketing professionals, or graphic designers working for e.g. a bank. However, it excludes non-creative occupations within creative businesses.
- Creative occupations in the West of England have higher pay than the average occupation, except for Associate Professional and Technical occupations. This group includes, among others, artists, designers, and authors.

Sources: Occupation Table, Emsi.

Cultural engagement and draw

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- The Active Lives survey (Arts Council, ran 2015-17) found that 78.2% of West of England residents had engaged with the arts, museums, and/or public libraries at least once in the past 12 months. This was significantly higher than the national average.
- The Taking Part survey (DCMS, most recently 2019/20) identified the South West as having a significantly higher level of engagement with the arts and with heritage than national levels for at least the previous five years.
- Tech City UK (2017) cited Bristol and Bath as the most productive tech cluster in the UK, with £8.1 billion digital tech turnover; and Bristol is one of only two cities outside London which feature in the top 10 for both creative and high-tech clusters.

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