

Solent Local Skills Improvement Plan

Creative Sector Deep Dive

Introduction

The creative sector was originally defined as:

“those industries which have their origin in individual creativity, skills and talent and which have potential for wealth and job creation through the generation and exploitation of intellectual property”.

Building on this the Department for Digital, Culture, Media and Sport (DCMS) outlined a definition comprising of nine sub-sectors, which include:

1. advertising and marketing
2. architecture
3. crafts
4. design (products, graphics and fashion)
5. film, TV, radio and photography
6. IT, software and video games
7. publishing
8. museum, galleries and libraries
9. music, performing and visual arts.

Based on this definition, the creative sector in the Solent is estimated to support in the region of 6,200 full-time equivalent (FTE) jobs across 1,700 enterprises and creates an annual contribution of around £600 million GVA.



Demand for skills

Data on the demand for roles in the sector shows that in 2022 there were around 3,400 job postings across the Solent. The figures show that job postings have been steadily declining since 2017, during which time these have trailed behind the wider economy's average rate.

Analysis of job posting indicates that demand is dominated by positions for illustrators and designers (both 2D and 3D), followed by journalists and editors. However, the demand for specialist roles, (e.g. audio/visual editors, creative managers, and translators and interpreters) is limited. This aligns with medium-term trends which suggest a shift towards content producers, digital marketing managers and social media coordinators, and people who can handle different responsibilities and balance multiple functions. This is reflective of an industry dominated by self-employed and micro businesses.

The skills supply

The Solent has a strong supply of learners in further education (FE) and/or higher education (HE) courses related to the creative sector. Areas of study are varied and include digital production, design and development, digital business services, broadcast and production, graphic design, software engineering and fashion design.

Data on FE registrations shows that the region had a total of 780 learners in courses related to the arts, media and publishing subject areas during the 2021/22 academic year, concentrated primarily in Portsmouth, Havant, and Southampton. The research reveals that 88% of learners within the Solent have sustained employment and/or learning in the year following completion of their studies. Despite this, median earnings for learners coming out of FE provision in the Solent tends to be lower than in neighbouring regions, but higher than the national average.

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Challenges and opportunities

The scale of opportunity

The creative sector supports an estimated 6,200 FTE jobs across the Solent. Whilst employment forecasts for the creative sector are not available, a 2016 study entitled '[The Geography of Creativity in the UK](#)' highlighted a cluster in and around Southampton (i.e. the only one within the Solent) for which it anticipated high concentration and growth.

Trend-based projections suggest that employment across the Solent will grow by an additional 60,800 jobs by 2040, and will be driven by growth in hospitality, health and the professional services. However, a look at constituent industries within the creative sector suggests that change will be driven by growth in the professional services, computing and IT, as well as media services.

A look at the likely drivers of growth in the creative sector over the next decades identifies three key opportunities. Whilst the City of Southampton was not successful to host the 2025 City of Culture, their bid included an ambitious programme of culture-led regeneration and events which are being repackaged and rolled out over the coming years. This has potential to increase visitor numbers, drive local expenditure and create additional demand for roles in the creative industries.

The Solent Freeport will also lead several opportunities for growth, including the creation of 1,000 jobs in creative occupations. Finally, advancements in digital technology will result in additional demand for creative roles across different sectors.

Skills gaps and challenges

Whilst the Solent has a strong skills base and labour market to draw on, discussions with employers and stakeholders have identified several gaps and challenges which could impact upon the sector's ability to meet the rising demand for skills across the region.

A common challenge identified by many is the ability to recruit people into their business. Consultees suggested that Covid-19 and Brexit have both impacted on the size and availability of the labour market. This is echoed in research which points to worrying trends and a growing skills shortage for the UK's creative industries since the Brexit vote in 2016.

Linked to the above are challenges associated with graduate retention across the region. Employers suggested that graduates tend to gravitate to other parts of the country (especially London) where the level of opportunity is perceived to be higher, and salaries better. In part, this challenge is due to a lack of awareness of the sector's strengths in the region, where employers describe a disconnect between FE and businesses due to limited engagement. It has been suggested that the situation is exacerbated by the lack of region-wide network organisations and/or events which bring together education providers, learners and employers.

Our engagement has also identified a general lack of awareness of possible career pathways including entry points into the sector. For many, work experience represents a key entry point, although it is noted that the sector offers a unique opportunity for individuals to join its workforce at different stages of their working lives.

Relevant Solent LSIP priorities for the Creative Sector

The Solent LSIP identifies 6 priorities to take forward. Designed to be crosscutting and applicable to a full range of sectors, these priorities seek to address the skills gaps and challenges identified. The relevant LSIP priorities are:

LSIP Priority 1: Awareness and aspiration

We will work with employers and skills providers across the Solent to raise awareness of the opportunities within the creative sector, with the scope of driving participation and improving graduate retention.

LSIP Priority 2: Navigating the skills ecosystem

We will engage with education providers from across the Solent to encourage co-ordination (and simplification) of the learning offer, with a view to reducing complexity and encourage creative businesses in the Solent (the majority of which are micro/small businesses) to better navigate the skills ecosystem.

LSIP Priority 3: Proactive employer engagement

We will promote, and where possible facilitate, higher levels of engagement between employers and learning providers from across the Solent (such as encouraging the co-location between industry and training providers, and promotion of a collaborative approach to training delivery – as promoted by the Solent LSIF).

LSIP Priority 4: A more agile ecosystem

We will work with training employers and skills providers to improve the responsiveness of the skills ecosystem by promoting the delivery of bite-size, modular and flexible continued professional development (CPD) for the creative sector.