Creative Industries
Policy & Evidence Centre
Led by nesta

The Relationships Between Cultural Organisations and Local Creative Industries in the Context of a Cultural District

Final Research Report

January 2021

This project is funded by the Creative Industries Policy and Evidence Centre (PEC), which is led by Nesta and funded by the Arts and Humanities Research Council

AEA Consulting

Table of Contents

1 Introduction

This research explores the relationships between cultural organisations and local creative industries in the context of a cultural district, defined here as an urban geographic area with a high concentration of cultural and creative businesses. Focusing on Culture Mile, a cultural district in the City of London, as the key case study, findings are further developed and refined in the context of five other UK cultural districts: Better Bankside, Salford Quays, Newcastle/Gateshead Quays, Bristol Harbourside, and Dundee Waterfront. This analysis is centred on locally based 'anchor' cultural organisations and creative industries firms and self-employed professionals or freelancers. The 'creative industries' are defined using the UK Department for Digital, Culture, Media and Sport (DCMS) classification that includes: advertising and marketing; architecture; crafts; design and designer fashion; film, TV, video, radio and photography; IT, software and computer services; publishing; museums, galleries and libraries; music, performing and visual arts.

The findings are drawn from desk research and mapping of creative industries in the six cultural districts; a literature review; and consultation with the staff of cultural organisations, creative industries firms and freelancers based in the districts studied. An in-depth understanding of relationships within Culture Mile was developed by analysing subsector clustering in the area; supply chain transactions data provided by three anchor cultural organisations (Museum of London, Barbican, Guildhall School of Music & Drama); an online survey and interviews with the staff of four anchor cultural organisations in Culture Mile (Museum of London, Guildhall School of Music & Drama, Barbican, London Symphony Orchestra (LSO)); a virtual focus group with creative freelancers based in or near the Culture Mile area; and an online survey of locally based creative industries firms and freelancers.

The range of relationships explored includes interorganisational links, networks, supply chains, knowledge exchange and skill share, provision of cultural services and events, partnerships, and the perceived impact of anchor cultural organisations on placemaking and area branding.

The research was undertaken between February and August 2020 and funded by the Creative Industries Policy and Evidence Centre (PEC), which is led by Nesta and funded by the Arts and Humanities Research Council. Due to the impact of the COVID-19 pandemic, and the subsequent nationwide lockdown in the UK, the methodology was adjusted to accommodate virtual consultation; no in-person observations or consultation were undertaken over the research period.

The research team comprised Sherif El-Itriby, Harry Fisher-Jones, Christie Lam, and Natalia Vartapetova of AEA Consulting; Sian Bird, Culture Mile; Adrian Ellis, Global Cultural Districts Network; and advisor Professor Geoffrey Crossick. We are grateful to everyone who contributed their time and insights over the course of this study while working under extraordinary pressures brought about by the pandemic.

2 Methodology

This project sought to deepen the understanding of urban clusters in which not-for-profit cultural organisations and creative industries firms and freelancers coexist and the synergies between the for-profit creative industries and not-for-profit cultural organisations. Specifically, by taking a place-based approach, the study sought to explore the ways in which co-location in a cultural district or cluster may benefit mutual development. A cultural district, for these purposes, is defined as an area with a high concentration of cultural facilities and programs, usually with some formal articulation or designation. A cluster has similar attributes but is not formally organised and recognised.

We sought to identify the range of potential causes of and effects from the co-location of anchor not-for-profit cultural organisations and for-profit creative industries from the perspectives of both sectors. Culture Mile in the City of London was the core case study district in which we conducted an in-depth analysis of interorganisational relationships and networks employing both qualitative and quantitative methods. We then conducted comparative analysis of five other cultural districts and clusters across the UK to explore a diversity of cultural and regional landscapes, levels of maturity and formalisation, and creative industries contexts: Better Bankside (London), Bristol Harbourside, Dundee Waterfront, Newcastle/Gateshead Quays and Salford Quays.

The key steps in our methodology were:

1. Literature Review and Desk Research

A review of existing studies and research relating to the creative industries, innovation, and districts/clusters, especially those that explore the interactions between cultural organisations and the creative industries at the local level.

2. Defining and Mapping the Creative Industries Sector

Using public datasets and definitions of the creative industries, we mapped the creative industries with each district, analysing their distribution and any observable clustering.

3. Institutional Data Analysis

We analysed available institutional data from three of the anchor cultural organisations in Culture Mile – including some transactional data – to identify any direct interorganisational relationships and supply chain links.

4. Consultation

We consulted 154 individuals by means of bilateral interviews and online questionnaires: 64 consultees are the staff of anchor cultural organisations and 90 are creative industries professionals across the six cultural districts, including six creative freelancers based in Culture Mile who participated in an online focus group (Figure 1 below summarises the distribution of consultees). The empirical findings from consultation are provided in Section 4 of this report.

Figure 1 Summary of consultation engagement

	Anchor Cultural Organisations Staff	Creative Industries: Firms and Freelancers & Other	Total individuals consulted
Culture Mile	43	59	102
Better Bankside	4	4	8
Bristol Harbourside	5	10	15
Dundee Waterfront	4	6	10
Salford Quays	3	7	10
Newcastle-Gateshead Quays	5	4	9
Total consultees for the study	64	90	154

* "Other" include universities and sector associations where those are active players in local creative industries
** BBC MediaCity accounted under Creative Industries

The COVID-19 pandemic and subsequent lockdown in the UK has impacted data collection for this research, specifically the availability of representatives of cultural organisations and creative industries to engage in consultation. In-person consultation methods (interviews and focus groups) have been replaced by phone and video interviews. Under these circumstances, we were only able to engage individuals who continued to be employed or conduct their business throughout 2020, as those on furlough or made redundant were not available for consultation.

The question that remains uncertain is how the place-based relationships we explore in this study will change over time as we adapt to new ways of working, including creative work and cultural production.

3 Literature Review

The arts and culture are now established as a focus for economic policymakers – linked to the fortunes of cities, and the national economy. This correlation between the presence of creative industries in the form of clusters and quarters, precincts or districts, and the economic performance of cities has been explored extensively in empirical studies. A key aspect of these – the role of not-for-profit cultural organisations and the impact on their local areas and, in particular, on co-located creative firms – has not been as widely explored. This section first reviews the literature on the impact on the UK creative industries as a whole. This is followed by addressing two key aspects of this: the role and impacts of cultural organisations as 'anchors', and of cultural and creative districts. Where the literature identifies a significant connection between the not-for-profit cultural sector and for-profit creative industries, there is little sustained analysis of such relationships in the context of cultural districts. This report aims to contribute to the literature on place-based relationships in the creative industries, as well as exploring the full spectrum of interactions, both economic and non-economic, between anchor cultural organisations and local creative industries.

3.1 UK Creative Industries

The creative industries have become an increasingly significant sector of the UK's economy in the past two decades. One in eight UK businesses are creative enterprises and, up until the outbreak of COVID-19 in 2020, the sector was collectively responsible for contributing £101.5 billion gross value added (GVA) to the British economy.[1] Prior to 2020, the sector had been growing rapidly, creating jobs at twice the rate of the UK average.[2]

The significant impact of the creative industries on the wider UK economy has been evaluated extensively, through a variety of mapping studies and analyses of subsectors, regions and cities.[3] Underpinning much of the literature is the concept of the 'creative city'. Its proponents, notably Charles Landry and Franco Bianchini, argued that a vibrant arts and cultural scene increases the competitiveness

---

[1] Charlotte Chung, Luise Yang, Evy Cauldwell-French, *Growing the UK's Creative Industries: What creative enterprises need to thrive and grow* (London: Creative Industries Federation, 2018), 3.

[2] Chung et al, 3.

[3] Juan Mateos-Garcia, Hasan Bakhshi and Mark Lenel, *A Map of the UK Games Industry* (London: Nesta, 2014); Hasan Bakhshi, John Davies, Alan Freeman and Peter Higgs, *The Geography of the UK's Creative and High-Tech Economies* (London: Nesta, 2015); Juan Mateos-Garcia and Hasan Bakhshi, *The Geography of Creativity in the UK* (London: Nesta, 2016); Juan Mateos-Garcia, Joel Klinger and Konstantinos Stathoulopoulos, *Creative Nation. How the creative industries are powering the UK's nations and regions* (London: Nesta, 2018) and Centre for Economics Business Research, *The contribution of the arts and culture to the national economy* (London: CEBR, 2013).

of a metropolitan area.[4] American economist Richard Florida additionally argued that the attraction of enterprise and creative labour, what he termed the 'creative class', were key components of this relationship.[5] Florida's definition of the creative class is often criticised for its breadth – encompassing diverse professions from lawyers and accountants to artists – but the correlation between the arts and cultural sector and metropolitan development remains a mainstay of both literature on the creative economy and, subsequently, urban policy.[6] Quantitative studies of regions and single-city studies within and outside of the UK have sought to demonstrate that the creative industries contribute a swathe of economic benefits – such as GVA, job creation, increased number of firms and increased investment.[7]

In addition, policy interventions and other initiatives have been pursued to stimulate the dynamics of clustering – the process by which interdependent businesses in tangential or related subsectors are concentrated in one area.[8] In the 1990s, the economist Michael Porter popularised the notion that clusters of businesses have a plethora of positive effects on innovation, business growth and productivity in a local area, building on Alfred Marshall's observations of industrial clustering in his seminal *Principles of Economics* (1890).[9]

Within the UK, major cities have seen a high concentration of creative businesses: in addition to London, other mapping studies, including a 2013 study by Nesta, have identified key hotspots in Manchester, Brighton, Cambridge, Edinburgh and Cardiff.[10] As such, investment in fostering clusters has become a popular tool for policymakers and funders, including the UK government, in order to capture some of the benefits of clusters. For example, the UK's Industrial Strategy (2018) has earmarked £150

---

[4] Charles Landry and Franco Bianchini, *The Creative City: A Toolkit for Urban Innovators* (London: Demos, 1995).

[5] Richard Florida, *The Rise of the Creative Class: and how it's transforming work, leisure, community and everyday life* (New York, NY: Basic Books, 2002). Florida builds upon Jane Jacobs' work in the 1980s. See Jane Jacobs, *Cities and the wealth of nations: Principles of economic life* (New York, NY: Random House, 1984).

[6]

Brian Knudsen et al, 'Density and creativity in US regions,' *Annals of the Association of American Geographers* 98:2 (2008): 461-478; Ann Markusen and Greg Schrock, 'The Artistic Dividend: Urban Artistic Specialisation and Economic Development Implications,' *Urban Studies* 43(10) (2006): 1661-1686.

[7] EY, *Creating growth.: Measuring cultural and creative markets in the EU* (Paris: Ernst & Young Global Limited, 2014); Christopher Rocks, *Working Paper 89, London's creative industries – 2017 update* (London: GLA Economics, 2017)

[8] On clusters, see Hasan Bakhshi, Ian Hargreaves and Juan Mateos-Garcia, *A Manifesto for the Creative Economy* (London: Nesta, 2013), 58-59. This is differentiated with creative hubs – a method of organising businesses together in a defined network that is also space-specific, centred around building(s), and working at a local and regional level. For more on the differentiation between clusters and hubs, see Jon Dovey, Andy C Pratt et al, *The Creative Hubs Report: 2016* (UK: British Council, 2016),10-11.

[9] Michael Porter, *The Competitive Advantage of Nations* (New York, NY: The Free Press, 1990).

[10] Bakhshi et al, *A Manifesto for the Creative Economy*, 305.

million for investment in creative businesses, including £80 million for the Creative Industries Clusters Programme research delivered by the Arts & Humanities Research Council (AHRC).[11]

However, academic assessments of cluster policies in the UK are on the whole negative. For example, Max Nathan and Henry Overman suggest that measures are based upon fundamentally misguided conceptual frameworks, looking at the 'macro' cluster level in the form of number of firms and employees, resulting in minimal or even, detrimental results through market overcrowding and net productivity losses.[12] With a resurgence in cluster policy and thinking, it is important that further investigations of place-based relationships address Nathan and Overman's recommendation – that strategies should be cognizant of dynamics at the individual level, such as revenue per employee.

3.2 The Importance of Freelancers

It is important that metrics capture data at the occupational level in particular because of the large proportion of freelancers and self-employed workers (47% of all employed) in the creative industries.[13] Melisa Wickham estimates that 15% of London's workforce is freelance or self-employed.[14] Robust studies on creative freelancers are sparse; one exception is Oli Mould, Tim Vorley and Kai Lu's assessment of the hidden importance of creative freelancers to the sector. Building upon earlier arguments, like those developed by Justin O'Connor, Mould et al highlight that freelancers not only represent a large proportion of creative labour, but also sustain larger firms as key leaders and drivers in project-based work.[15] Other studies and more recent mapping reports have confirmed their prevalence and other contributions to the sector, for example in providing scaling flexibility and increasing

[11] Mateos-Garcia et al, *Creative Nation* and HM Government, *Industrial Strategy: Creative Industries Sector Deal* (UK: HM Government, 2018), accessed 19 May 2020, https://www.gov.uk/government/publications/creative-industries-sector-deal. The AHRC has implemented a number of other programmes to support the development of creative clusters including £16 million investment in four Knowledge Hubs – Creative Exchange in Lancaster, Design in Acton, Creative Works in London and Research and Enterprise in the Arts and Creative Technologies in Bristol.

[12] Max Nathan and Henry Overman, 'Agglomeration, clusters, and industrial policy,' *Oxford Review of Economic Policy,* Volume 29, Number 2, 2013, pp. 383-404 and Max Nathan, 'Does Light Touch Cluster Policy Work? Evaluating the Tech City Programme,' *CEP Discussion Paper No 1648* (London: Centre for Economic Performance, August 2019).

[13] DCMS data, available from https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2019-employment.

[14] Melisa Wickham, 'Self-employment in London' *GLA Economics Working Paper 56* (2013). https://www.london.gov.uk/sites/default/files/gla_migrate_files_destination/SE%20in%20London.pdf. Accessed 20 August 2020.

[15] Oli Mould, Tim Vorley and Kai Lu, 'Invisible Creativity? Highlighting the Hidden Impact of Freelancing in London's Creative Industries,' *European Planning Studies* 22:12 (2014): 2436-2455 and Justin O'Connor, *The cultural and creative industries: A review of the literature* 2nd edition (London: Arts Council England, 2007).

collaboration.[16] However, their significance is underreported – grouped with micro-businesses, they are generally not accurately measured in mapping reports and policymakers do little to address their needs directly.[17] As such, freelancer contributions to the creative sector require more sustained study.

3.3 Anchor Cultural Organisations

Cultural organisations dedicated to the production, development, and promotion of music, dance, theatre, literature and the visual arts, are another core component of the cultural ecology. Major public facing institutions are increasingly characterised as 'anchors' by policymakers and academics in their significant roles in serving communities: offering jobs, services, entertainment options, social centres, and other amenities that make urban life attractive.[18] First emerging in the 2000s in the US, the concept of 'anchor institutions' has become widely integrated into urban regeneration policy and practice.[19] In the UK, the most commonly identified anchor organisations are higher education institutions (HEIs), local enterprise partnerships (LEPs) and hospitals ('eds and meds') that are tied to particular locations.[20] Like other community anchors – universities, hospitals, sporting grounds, etc. – they are used by policymakers to contribute to urban reinvention, vitality and civic pride, attracting major investment and

---

[16] Clay Spinuzzi, 'Working alone together: Co-working as emergent collaborative activity,' *Journal of Business and Technical Communication* 26(4): 399-441; Dieter Bögenhold and Andrea Klinglmair, 'Independent work, modern organisations and entrepreneurial labour: Diversity and hybridity of freelancers and self-employment,' *Journal of Management & Organisation* 22(6): 843-858; Mateos-Garcia and Bakhshi, *The Geography of Creativity in the UK*, 23; Eliza Easton and Evy Cauldwell-French, *Creative Freelancers* (London: Creative Industries Federation, 2017) and Jonathan Sapsed et al, *Brighton Fuse 2: Freelancers in the Creative Digital IT Economy* (Swindon: AHRC, 2015).

[17] Mould et al, 2443; Easton and Cauldwell-French, *Creative Freelancers* (2017) and Mateos-Garcia et al, *Creative Nation* (2018).

[18] Karen Brooks Hopkins, *The Anchor Project* (SMU DataArts, 2019) and Eugénie L. Birch, Cara Griffin, Amanda Johnson, Jonathon Stover, Arts and Culture Anchor Organisations as Urban Anchors (Penn Institute for Urban Research, 2013).

[19] Anchor Institution Task Force, *Anchor organisations as partners in building successful communities and local economies: A report* (Washington, DC: U.S. Department of Housing and Urban Development, 2009). For the UK, see the work of Centre for Local Economic Strategies' reports, such as this report on anchors in Preston: Centre for Local Economic Strategies, *Creating a Good Local Economy. The role of anchor organisations* (Manchester: Centre for Local Economic Strategies, 2015).

[20] For a comprehensive definition of anchor organisations, see UK Commission for Employment and Skills, *Anchor organisations and small firms in the UK: A review of the literature,* (March 2015), 5, accessed 24 August 2020, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/414390/Anchor_organisations_and_small_firms.pdf; Centre for Local Economic Strategies, *Community business and anchor organisations. February 2019,* accessed 24 August 2020, https://cles.org.uk/wp-content/uploads/2019/02/Community-business-and-anchor-organisations-Digital.pdf and Sara Reed, Anya Göpfert, Suzanne Wood, Dominique Allwood and Will Warburton, *Building healthier communities: the role of the NHS as an anchor institution* (August 2019), accessed 24 August 2020, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/414390/Anchor_organisations_and_small_firms.pdf.

encouraging the integration of local supply chains.[21] While there are a large number of economic impact studies on individual arts and cultural organisations, only recently has the literature begun to explore arts and cultural organisations as anchors in their own right – notably the Initiative for a Competitive Inner City's 2019 US study, *The Overlooked Anchors*.[22] The majority of impact studies of not-for-profit cultural organisations are largely concerned with their financial impact, using metrics such as job creation and business turnover – many of the anchors analysed as part of this report, such as Sage Gateshead in Newcastle and V&A Dundee, have conducted economic impact studies.[23] But where studies of individual anchors identify sector and economy-wide benefits, systematic analysis of intangible effects such as city branding and social cohesion is lacking and, in particular, the localised effects of anchors on neighbouring creative businesses is under-examined. Economic impact analyses have recently come under additional scrutiny; although effective ways of measuring expenditure and financial value, they reduce what should otherwise be a wide-ranging evaluation of the *various* impacts of the organisation under inquiry, to its financial implications.[24] The impact studies also face criticism in failing to take into account displacement effects.[25]

John Holden has proposed a broader 'ecological' framework that sees the creative industries as fundamentally interconnected and interdependent, and Mark Stern and Susan Seifert propose a mixed methodology that is able to track both the value of economic transactions in addition to intensity in relation to both individuals and the neighbourhood, in addition to the use of comparative case studies, of which the latter forms a crucial aspect of this report.[26]

---

[21] Bakhshi et al, *A Manifesto for the Creative Economy*, 314-315 and Beatriz Garcia, Ruth Melville, Tamsin Cox *Creating an impact: Liverpool's experience as European Capital of Culture* (Liverpool: University of Liverpool, 2010).

[22]; Kim Zeult et al, *The Overlooked Anchors. Advancing a New Standard of Practice for Arts and Culture Organisations to Create Equitable Opportunity in America's Cities* (Roxbury, MA: ICIC, 2019).

[23] ERS Research & Consultancy, *NGCV, Economic Impact Assessment 2015-2016,* accessed 24 August 2020, http://www.case4culture.org.uk/wp-content/uploads/2017/01/NGCV-Economic-Impact-Assessment-Report-2015-16-ERS-18-Nov-2016.pdf; Eskogen Reference Economic Consultants, *V&A Dundee Economic Impact Assessment. Year 1 impacts for V&A Dundee. Final Report January 2020,* accessed 23 August 2020, https://www.vam.ac.uk/dundee/info/policies; Steve Westbrook, *Economic Impact Evaluation of Dundee Contemporary Arts. Final Report,* accessed 2 September 2020, *http://www.evaluationsonline.org.uk/evaluations/Browse.do?ui=browse&action=show&id=165&taxonomy=BCS* and BBC, *The Economic Value of the BBC: 2011/12. A Report by the BBC* (London: BBC, 2013).

[24] For an early example of such critiques, see Arthur H. Sterngold, 'Do Economic Impact Studies Misrepresent the Benefits of Arts and Cultural Organisations?,' *The Journal of Arts Management, Law, and Society,* 34:3 (2004): 166-187.

[25] Seaman, Bruce. (2011). Economic impact of the arts. A Handbook of Cultural Economics, Second Edition. 201-210.

[26] Mark J Stern and Susan Seifert, 'Cultural Clusters: The Implications of Cultural Assets Agglomeration for Neighbourhood Revitalisation,' *Journal of Planning Education & Research* 29:3 (2010), 276.

Increasingly, a combination of quantitative and qualitative methods are used to capture more intangible impacts and synergies between anchors and their local environments. One example is the use of network analysis in Kay Oehler and Stephan C. Sheppard's study of the networks surrounding MASS MoCA and 60 other organisations in the North Adams / Williamstown area in Massachusetts, USA. This study found frequent interconnections between organisations – only 11 of the 60 organisations were found to have no connection to any other local organisation.[27]

Studies have also commented widely on the negative impacts of anchors, especially large, commercially oriented infrastructure developments. Carl Grodach *et al*'s study of 100 US metropolitan areas notes a host of negative impacts generated by large anchor organisations, however, states that *not-for-profit* cultural facilities deliver long-lasting social benefits.[28] A significant UK example is the work of Roberta Comunian and Oli Mould, whose 2014 review of Sage Gateshead fundamentally questions the role of such flagship cultural projects in regeneration – noting effects of gentrification and displacement from increased tourism.[29] The acknowledgement by authors such as Geoffrey Crossick and Patrycja Kaszynska of the difficulty of measuring intangible aspects of regeneration, such as heritage, community identity and memory, suggest that research foci could usefully be shifted to address the more subtle and sustainable impacts of smaller cultural assets that also play a role in such policies, in addition to capturing other intangible impacts of large cultural organisations.[30]

3.4 Creative Placemaking

Recently, there has been a re-evaluation of the impacts of flagship cultural organisations – namely the policy implications in the form of 'creative placemaking'. Placemaking is a broad term for an interdisciplinary approach to design and planning, which emphasises the importance of public space and community in the creation of vibrant and welcoming neighbourhoods. The literature on place and placemaking has continued to proliferate since the 1990s across the human sciences and professions ranging across planning, architecture, social anthropology and geography.[31] Creative placemaking redeploys this approach for the policy context which prioritises arts and culture in order to shape the

[27] Kay Oehler et al, *Network Analysis and the Social Impact of Cultural Arts Organisations* (Williamstown, MA: Centre for Creative Community Development, 2007).

[28] Carl Grodach et al, *Gentrification and the artistic dividend: the role of the arts in neighbourhood change* (Washington, DC: National Endowment for the Arts, 2014).

[29] Roberta Comunian and Oli Mould, 'The weakest link: Creative industries, flagship cultural projects and regeneration,' *City, Culture and Society* 5 (2014): 65-74.

[30] Crossick and Kaszynska, 80-83.

[31] For an example, see Lynda H. Schneekloth & Robert G. Shibley, *Placemaking: The Art and Practice of Building Communities* (New York, NY: Wiley, 1995).

physical character and social relations of an area around arts assets and interventions. It is rooted in the research and language developed by Ann Markusen and Anne Gadwa in a 2010 white paper, and has since been a major priority for the American National Endowment for the Arts.[32] Numerous investigations have argued that anchors contribute to reshaping the physical and social dynamics of a place, leading to a vast assortment of benefits ranging from improved health, happiness, diversity, educational attainment, reduced crime, amongst many others. The approach's most outspoken supporters promote the building of major cultural infrastructure to trigger economic development and alleviate social concerns.[33] However, without a sufficiently long-term view and a mixed qualitative-quantitative approach to needs assessments, the impact of immediate short-term injections from 'hardware' developments and capital projects can be exaggerated and instead fail to be delivered equally across different social groups.[34]

Stern and Seifert, specifically, have demonstrated that total neighbourhood revitalisation fails to materialise at all, and instead intangible benefits such as civic engagement are far more likely and significant.[35] Most notably discussed is the 'Bilbao Effect', where efforts to replicate the 'success story' of the Guggenheim Bilbao's revitalisation of its neighbouring city belie the complex impact of a large, landmark cultural building.[36]

3.5 The Role of Cultural and Creative Districts

Anchor cultural and creative organisations and their concurrent ecology of smaller-scale assets and businesses are key loci within cultural and creative quarters or districts – that is, in institutionalised and formalised concentrations of creative sector businesses. Several typologies exist to characterise them, such as Walter Santagata's four major types[37]:

---

[32] Ann Markusen and Anne Gadwa, *Creative Placemaking* (White Paper), (Washington, DC: National Endowment for the Arts, 2010).

[33] For example, see Chris Smith, *Creative Britain* (London: Faber and Faber, 2000); DCMS, *Culture at the heart of regeneration* (London: DCMS, 2004).

[34] Steven Miles and Ronan Paddison, 'Introduction: The Rise and Rise of Culture-led Urban Regeneration' *Urban Studies* 42:5/6 (May 2005): 837.

[35] Mark J Stern and Susan C Seifert, 'Cultural Clusters: The Implications of Cultural Assets Agglomeration for Neighbourhood Revitalisation', *Journal of Planning Education & Research* 29:3 (2010), 262 and Mark J. Stern and Susan C. Seifert, 'Culture and Urban Revitalisation: A Harvest Document' *Culture and Community Revitalisation: A Collaboration* 7 (2007).

[36] On a revised account of the Guggenheim Bilbao, see Beatriz Plaza, Manuel Tironi and Silke N. Haarich, 'Bilbao's Art Scene and the "Guggenheim effect" Revisited,' *European Planning Studies* 17:11 (2009):1711-1729.

[37] Walter Santagata, 'Cultural district, property rights and sustainable economic growth,' *International Journal of Urban and Regional Research*, 26:1 (2002): 9-23. For consistency, the term cultural district will refer to both districts and quarters.

1. Industrial cultural district – growth is spontaneous;
2. Institutional cultural district – centred around formal organisations with formalised trademarks;
3. Museum cultural district – centred around museum networks, as a result of public policy;
4. Metropolitan cultural district – an agglomeration of cultural organisations.

Other types of cultural districts include entertainment districts (often with a highly developed night-time economy), theatre districts, design districts, and education districts.

The scholarship on cultural and creative districts is divided between text-book style classifications or 'manuals', notably Simon Roodhouse's *Cultural Quarters: Principles and Practice,* published in 2006, and individual and regional studies of named districts.[38] However, a recent shift in terminology has been identified by Comunian and Mould in their assessment of cultural districts and urban policy – from cultural to *creative* districts – unlike the Francesconi's identification of specialised districts, many of these new formations span several parallel and adjacent sectors within the creative industries.[39]

Unlike the process of clustering, districts tend to be discussed in terms of cultural consumption, and primarily as an engine of economic growth and regeneration. 'Successful' districts as identified by Roodhouse and John Montgomery are those that contribute to creative placemaking and overall economic performance.[40] Methodologically, the dynamics of co-location are discussed in relation to both districts and clusters, primarily the existence of spillover effects, defined as activities of one firm or industry that produce benefits for another that are not fully reflected back to their point of origin. They can be intentional or unintentional, direct or indirect, negative or positive.[41] A typology in use by the DCMS and developed by Frontier Economics identifies three sub-categories: knowledge, industry and network spillovers.[42]

[38] On the former see, Simon Roodhouse, *Cultural Quarters: Principles and Practice* (Bristol: Intellect Books, 2006); Charles Landry, *The Art of City-making* (London: Earthscan, 2006) and more recently, Alberto Francesconi, *Advanced Cultural Districts: Innovative Approaches to Organisational Design* (Basingstoke: Palgrave Macmillan, 2015); and on individual case studies, examples are, John McCarthy, 'Promoting image and identity in 'Cultural Quarters': The case of Dundee,' *Local Economy* 20(3), 280-293 and Jo Foord, 'The new boomtown? Creative city to Tech City in east London,' *Cities* 33 (2013): 51-60.

[39] Francesconi, 4.

[40] Roodhouse, 22 and John Montgomery, 'Cultural Quarters as Mechanisms for Urban Regeneration. Part 1: Conceptualising Culture Quarters,' *Planning, Practice & Research,* 18:4 (November 2003): 293-306.

[41] Caroline Chapain, Phil Cooke, Lisa De Propris, Stewart MacNeill & Juan Mateos-Garcia, *Creative clusters and innovation. Putting creativity on the map* (London: Nesta, 2010), 24.

[42] Frontier Economics, *Creative Industry Spillovers: understanding their impact on the wider economy* (London: Frontier Economics, 2007).

The majority of studies of spillover effects have been concerned with the more narrowly defined economic implications of these spillovers, recognising that co-located businesses benefit from enhanced competitiveness as a result of horizontal and vertical integration – such is the line of argument taken by Andy Pratt, for example, noting that co-located businesses in the advertising sector see an overall reduction in costs.[43] Although this is well-explored for industrial clusters, the exploration of the creative industries' 'non-economic' spillovers is sparse. One exception is Nesta's 2010 report *Creative clusters and innovation,* which focuses on knowledge and network spillovers.[44] The growing recognition of 'innovation districts', those high in knowledge exchange networks, reaffirm the importance of intangible synergies relating to knowledge and innovation transfer. There is evidence to suggest that co-located businesses and, as such, creative districts see additional benefits stemming from formal and informal idea sharing between anchors, organisations, businesses and individuals. This has been explored in several studies, such as Holden's *The Ecology of Culture,* the 2010 Nesta report on clusters and wider innovation, and Kat Hanna's report on the knowledge economy and innovation districts in London.[45] Clustering and knowledge exchange have been further explored in studies of individual organisations or spatial districts, such as an economic impact study of the BBC conducted by Deloitte, that found strong networks for knowledge exchange, or a June 2018 audit of the Knowledge Quarter in King's Cross, which found that HEIs and research units in the area accelerated expansion of this district.[46] These studies also highlight the importance of 'network brokers' that facilitate deeper and long-term collaboration.[47] The importance of creative workers to their localities in addition to the wider economy has also been explored to some degree – for example in Kathrin Müller *et al's* appraisal of creative workforce mobility and its facilitation of knowledge sharing between other industries.[48] However, as Nesta's 2014 study

[43] Andy Pratt, 'Advertising and creativity, a governance approach: A case study of creative agencies in London,' *Environment and Planning A,* 38:10, (2006) and Tom Fleming and Andrew Erskine, *Supporting growth in the arts economy* (UK: ACE, 2011), 10-14.

[44] Chapain et al, *Creative clusters and innovation,* 26. Other studies that discuss intangible Also see Mark J Stern and Susan C Seifert, *"Natural" cultural districts: Arts agglomeration in metropolitan Philadelphia and implications for cultural district planning* (Philadelphia, PA: University of Pennsylvania, 2005), Mark J Stern and Susan C Seifert, *Cultivating "Natural" Cultural Districts* (Philadelphia, PA: Reinvestment Fund, 2007).

[45] John Holden, *The Ecology of Culture: a Report Commissioned by the Arts and Humanities Research Council Cultural Value Project* (Wiltshire: AHRC, 2015); Chapain et al, *Creative clusters and innovation* and Kat Hanna, *Spaces to think: Innovation Districts and the changing geography of London's knowledge economy* (London: Centre for London, April 2016).

[46] BBC, *The Economic Value of the BBC: 2011/12. A Report by the BBC* (London: BBC, 2013) and Department for Business, Energy & Industrial Strategy, *Knowledge Quarter Science and Innovation Audit* (June 2018).

[47] Department for Business, Energy & Industrial Strategy, *Knowledge Quarter Science and Innovation Audit* (June 2018).

[48] Kathrin Müller et al, *The Role of Creative Industries in Industrial Innovation. ZEW Discussion Paper 08-109.* Retrieved from *www.tandfonline.com/doi/abs/10.5172/impp.11.2.148*

reiterated, innovation is particularly difficult to measure in the creative sector over an extended period of time, with outcomes often intangible and not readily measured in the same way as patent volumes or the value of research and development.[49]

The evaluation of creative districts solely within an economic framework is criticised by Comunian and Mould in their assessment of cultural districts policy in the UK.[50] They find that the literature overemphasises the role of cultural districts in positive urban change, and can actually contribute to narrowing the diversity of 'creative' work within districts, driving out smaller firms and start-ups as office rents increase. They identify three detrimental impacts of districts – community impoverishment, precariousness and short-termism. The literature as it stands does not address sufficiently non-economic effects or recognise these negative by-products of districts, in favour of headline economic growth.

Earlier studies that assess the adverse consequences of cultural districts, such as Karen Chapple et al's study of formal and informal arts districts in the San Francisco Bay Area, also present a similarly mixed or negative picture – for example, Chapple et al's study suggests that benefits received by the largest businesses in a cluster or district do not trickle down to the smallest businesses and individuals, in particular artists and marginalised communities.[51] It is therefore important that further evaluation of cultural districts address the pluralities of 'creativity' that might and should exist, vis-à-vis Mould's persuasive concept of 'urban subversion' or, in other words, true drivers of creativity in the form of sub-cultures and unique localities.[52]

There are several non-economic features highlighted in the literature that merit further discussion. One is the necessity and importance of strong informal networks – as described by Elizabeth Currid in *The Warhol Economy,* highlighting the informal and vibrant interrelationships between nightclubs and live venues in New York, or Anna Lee-Saxenian's study of Silicon Valley and the productive informal relationships between tech firms.[53] The second is 'branding', the attractiveness of a place, as discussed in

---

[49] Hasan Bakhshi, Neil Lee and Juan Mateos-Garcia, Nesta Working Paper No. 14/06, Capital of culture? An econometric analysis of the relationship between arts and cultural clusters, wages and the creative economy in English cities (London: Nesta, 2014); Edwin J. Nijssen, Bas Hillebrand, Patrick A.M. Vermeulen and Ron G. M. Kemp, 'Exploring product and service innovation similarities and differences.' *International Journal of Research in Marketing* 23:3, 241-251.

[50] Oli Mould and Roberta Comunian, 'Hung, Drawn and Cultural Quartered: Rethinking Cultural Quarter Development Policy in the UK,' *European Planning Studies* 23:12 (2015), 2356-2369.

[51] Karen Chapple et al, 'Concentration Creativity: The Planning of Formal and Informal Arts Districts' City, *Culture and Society* 1:4 (December 2010): 225-234.

[52] Oliver Mould, *Urban Subversion and the Creative City* (London: Routledge, 2015).

[53] Elizabeth Currid, *The Warhol Economy: How Fashion, Art, and Music Drive New York City* (Princeton, NJ: Princeton University Press, 2007); Anna Lee-Saxenian, *Regional Advantage: Culture and Competition in Silicon Valley and Route 128* (Boston, MA: MIT Press, 1996). For the UK, see Bakhshi et al, *A Manifesto for the Creative Economy*, 317-318.

Max Nathan *et al's* study of Tech City in East London as an organic 'bottom-up imaginary'; similarly David Salvesen and Henry Renski's study of North Carolina noted that businesses surveyed ranked the availability of social and cultural amenities as a key factor in their choice of location.[54]

However, studies have not rigorously assessed their connection to creative placemaking. Where evaluated, branding is often only addressed in relation to singular factors such as concentration of labour, or firm growth, such as Oliver Falck *et al*'s findings of concentrations of highly educated professionals in proximity to cultural anchors, in this instance, baroque opera houses.[55] The exception is Graeme Evans' work on the role of cultural districts and place branding.[56] The impact of branding within the framework of a cultural district would therefore be an effective avenue of investigation to cut across a variety of stakeholders – residential and financial – as well as isolating the effects of place-based relationships in the form of informal networks that may be obscured in high-level, regional or city-wide studies. In general, few studies have attempted to unpack these subtle connections between two of their primary tenants: cultural organisations and creative industries. For this study, cultural districts provide the context in which to investigate place-based connections between cultural and creative sectors.

3.6 Relationship between the not-for-profit cultural sector and for-profit creative industries

Florida's creative cities thesis proposes a complementary relationship between the not-for-profit cultural sector and for-profit creative industries. They share many of the same major objectives, despite some fundamental differences in their core missions or purposes, the legal structures in which they operate, and their underlying business models. Both, for example, seek to produce high-quality creative content that is relevant and attractive to their audiences. With such similarities as a basis for inquiry, the relationship and complementarities between these two sectors has developed as an area of research beginning in the 1990s.[57]

---

[54] Max Nathan, Emma Vandore and Georgina Voss, 'Spatial Imaginaries and Tech Cities: Place-branding East London's digital economy,' *Journal of Economic Geography* 19:2 (2018), 20; David Salvesen and Henry Renski, *The Importance of Quality of Life in the Location Decisions of New Economy Firms* (Chapel Hill, NC: Centre for Urban and Regional Studies, 2003). See also Christie Baxter et al, *Enterprising Places. Sustaining Competitive Locations for Technology-Based Activity (MIT- Cambridge Institute, Programme on Regional Innovation*, 2005).

[55] Oliver Falck, Michael Fristch, Stephan Heblich, 'The phantom of the opera: Cultural amenities, human capital, and regional economic growth,' *Labour Economics* 18 (2011): 755-766.

[56] Graeme Evans, 'Rethinking Place Branding and Place Making Through Creative and Cultural Quarters,' in *Rethinking Place Branding. Comprehensive Brand Development for Cities and Regions* eds. Mihalis Kavaratzis, Gary Warnaby, Gregory J. Ashworth (Cham: Springer, 2015), 135-158.

[57] For early examples see Alberta Arthurs, Frank Hodsoll and Steven Lavine, 'For-Profit and Not-for-Profit Arts Connections: Existing and Potential,' *The Journal of Arts Management, Law, and Society* 29:2 (1999): 80-96. and

In 2007, Arts Council England (ACE) published the research paper 'Publicly-funded Culture and the Creative Industries'. It sought to categorise the complex connections between the government funded cultural sector (including both cultural organisations and publicly funded organisations which support cultural activity) and the creative industries.[58] While the author, John Holden, acknowledges that these relationships are not yet fully comprehended, the report offers a broad overview of the generally understood, and often cited, positive relationship between cultural organisations and the creative industries. It can be summarised under three primary themes:[59]

Market and supply chain

- **Experimentation and risk-taking**: cultural organisations are testbeds for new and/or experimental ideas, products and services.
- **Commissioning and employment**: cultural organisations commission and employ creative industries which can offer specialised services and advanced technologies, while cultural workers are employed on an ad hoc basis in the wider creative industries.
- **Audience and market development**: cultural organisations help to educate and grow audiences for creative industries products and services.
- **Best practice**: cultural organisations offer models for practices and organisational forms within the wider creative economy.

Networking and knowledge exchange

- **Knowledge and skills development**: cultural organisations train workers, develop artistic talent, and enhance awareness of the creative and cultural sectors.
- **Networking and spillovers**: cultural organisations provide space for networking, act as brokers between sectors, and encourage innovation.
- **Product development and inspiration**: cultural organisations offer resources and inspire creativity used in the development of creative industries products and services.

Adrian Ellis and Sonali Mishra. 'Managing the Creative – Engaging New Audiences: A dialogue between for-profit and not-for-profit leaders in the arts and creative sectors' (Los Angeles, CA: The Getty Leadership Institute, 2004), accessed 19 May 2020, https://www.artstrategies.org/downloads/ManagingTheCreativeBackground.pdf.

[58] It is used as a reference point here as it was one of the preliminary and fundamental reports that informed creative industry and cultural policy debates in the UK, but other examples abound. John Holden, *Publicly-funded culture and the creative industries* (London: ACE, 2007).

[59] Framework adapted from Comunian and Mould, 'The weakest link', *City, Culture and Society* 5:2, 65-74.

- **Institutional memory**: cultural organisations preserve physical and digital material central to the creative industries and their heritage.

Image and attraction

- **Source of legitimacy**: cultural organisations are a platform and source of legitimacy for creative talent and productions.
- **Means of attraction**: cultural organisations are an attractor for creative industries business and workers which together create a critical mass of creative activity.

This typology, which sees a deep embedded relationship and widespread complementarities between the cultural sector and creative industries, is similar to David Throsby's 'concentric circles' model, which places the cultural sector at the centre of the creative value chain, suggesting that the spillover effects attributed to any cultural district arise from this unique synergy between the not-for-profit cultural sector and for-profit creative industries.[60]

These themes are often boiled down and repeated in policy and advocacy papers,[61] but there remain few academic studies that interrogate these assumed connections, particularly in relation to the second theme, that of networking and knowledge exchange. Studies point to the importance of co-production between for-profit and not-for-profit businesses in contributing to innovation and experimentation.[62] Such co-production can emerge directly between firms across sectors, as explored in Nesta's 2014 *Capital of culture?,* which attributed knowledge spillover effects in cities to the commercialisation of expertise produced by not-for-profit cultural organisations by for-profit creative firms.[63] Significant is the role of creative workers – a Creative and Cultural Skills' survey of theatre careers in the UK showed a flow of workers between subsidised and commercial theatres and emphasised the importance of subsidised theatre in talent development.[64] This results in stronger ideation across the creative sector in

---

[60] David Throsby, 'The concentric circles model of the cultural industries,' *Cultural Trends* 17:3 (2008), 188-204.

[61] For some recent examples, see Evy Cauldwell-French, Annie Lydford, *Public Investment, Public Gain. How public investment in arts contributes to growth in the creative industries* (London: Creative Industries Federation, 2019) and ACE / SDG Economic Development, *Exploring the role of arts and culture in the creative industries, June 2017*, accessed 19 May 2020, https://www.artscouncil.org.uk/sites/default/files/download-file/Exploring%20the%20role%20of%20arts%20and%20culture%20in%20the%20creative%20industries%20%28final%29.pdf.

[62] Geoffrey Crossick, *Knowledge Transfer without Widgets. The Challenge of the Creative Economy. Lecture to the Royal Society of Arts 2005* (London: Goldsmiths, 2006), accessed 2 September 2020; and Hasan Bakhshi & David Throsby, *Culture of innovation. An economic analysis of innovation in arts and cultural organisations* (London: Nesta, 2010).

[63] Bakhshi et al, *Capital of culture?*, 2014.

[64] Alexandra Albert, Hasan Bakhshi, Samuel Mitchell and Rachel Smithies, *Publicly-funded arts as an R&D lab for the creative industries? A survey of theatre careers in the UK* (London: Nesta/ ACE, 2013).

addition to related ones, as explored in a report by the Kresge Foundation and Initiative for a Competitive Inner City in 2019.[65]

Returning to Comunian and Mould's thesis they, conversely, have argued that there are negative connections between cultural organisations and the creative industries locally.[66] As part of a detailed case study on the impact of Sage Gateshead and BALTIC development on local creative industries, 136 local creative industries workers were interviewed to understand their experience of the development. While some interviewees cited positive impact on the image of the area, numerous challenges were also identified including rising rent prices (gentrification) caused by cultural organisations and competition between for profit and not-for-profit sectors (e.g. for funding). Similarly, Carl Grodach's earlier re-assessment of flagship cultural projects in California – the Museum of Contemporary Art in Los Angeles and SFMoMA and Yerba Buena in San Francisco – concludes that benefits from such large anchors are often overstated and not sustained over the long run, with many engagements occurring at a surface level only and not evenly between not-for-profit and for-profit creative firms.[67] Marco Bontje and Sako Musterd suggest that tensions between the different priorities of not-for-profit and for-profit activities are troubling and occasionally have deleterious effects.[68] These studies were able to uncover these outcomes through the use of surveys and interviews, reiterating the necessity of employing both quantitative and qualitative lines of enquiry in order to capture the dynamics of a cultural district and, indeed, accurately compare them.

3.7 Framework for this study

Overall, in mapping and analysis of relationships between cultural organisations and creative industries within the boundaries of a cultural district – using the case study of Culture Mile and five other districts in the UK – we seek to examine the key types of relationships identified in the literature review:

- **Supply chain interactions**: creative industries as suppliers or subcontractors to cultural organisations and vice versa, where creative industries firms and professionals are customers of cultural organisations;

---

[65] Zeult et al, *The Overlooked Anchors* (2019).

[66] Roberta Comunian and Oli Mould, 'The weakest link: Creative industries, flagship cultural projects and regeneration,' *City, Culture and Society* 5:2 (June 2014): 65-74.

[67] Carl Grodach, 'Looking Beyond Image and Tourism: The Role of Flagship Cultural Projects in Local Arts Development,' *Planning Practice & Research* 23:4 (2008): 495-516.

[68] Marco Bontje and Sako Musterd, 'Creative Industries, Creative Class and Competitiveness: Expert Opinions Critically Appraised,' *Geoforum* 40:5 (September 2009), 850.

- **Knowledge exchange, skills development and networking**: exchange of ideas, skills, professional knowledge, and creative concepts through formal and informal networking and collaboration between cultural organisations and creative industries firms and professionals;
- **Area branding and placemaking**: the impact of cultural organisations on the character of their local area and its attractiveness to creative businesses and freelancers conducting business locally.

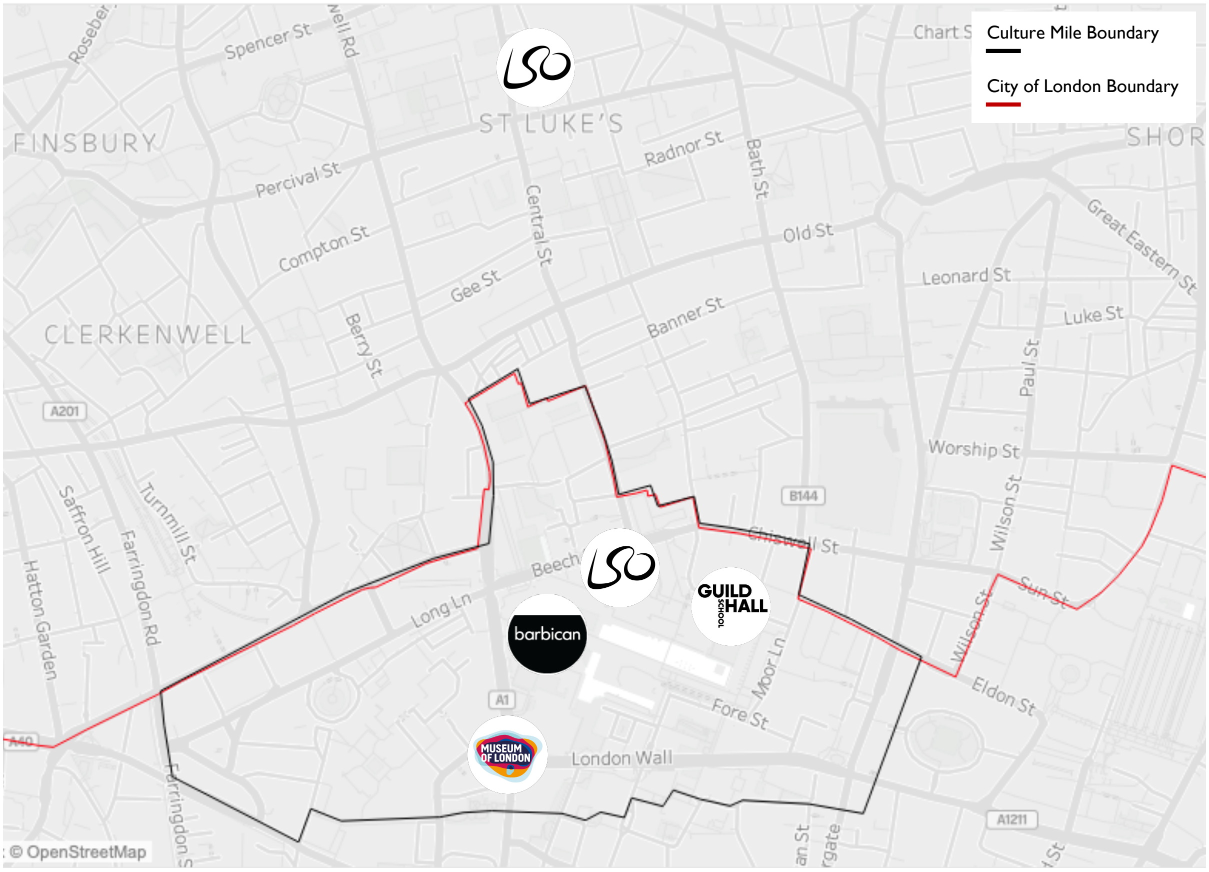
4 Culture Mile: Key Findings

Image source: Culture Mile website.

4.1 Introduction to Culture Mile

Culture Mile is a destination for culture and creativity in the north-west corner of the City of London (a map is provided in Figure 2). It was initiated by the City of London Corporation in 2017 together with four cultural and educational organisations ('Core Partners'): the Barbican Centre, the London Symphony Orchestra, the Guildhall School of Music & Drama, and the Museum of London. Its total area constitutes a little under a fifth of London's Square Mile (approximately 0.2 square miles). Culture Mile, and the larger Square Mile, has fewer numbers of residents compared to other London and UK boroughs and a very high concentration of large businesses and corporations, operating as a Central Business District for London and the South East, serving as a global financial centre.

Figure 2 Map of Culture Mile



Culture Mile was established as part of the City of London's Cultural Strategy and Corporate Plan for 2018 – 2023 with the explicit ambitions to:

- Contribute to changing perceptions of the City to ensure that it is recognised as a global leader in culture, creativity and learning as well as commerce; and
- Develop Culture Mile as a vibrant and welcoming cultural, creative & learning destination for all.

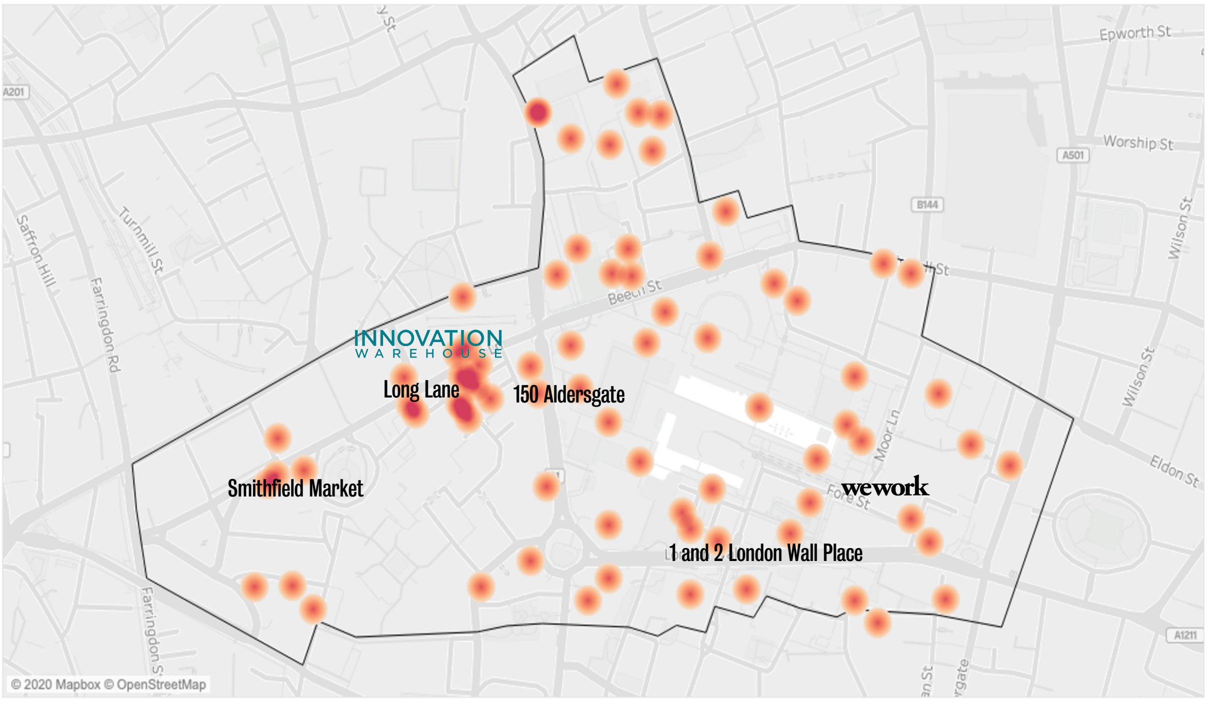
Since its foundation, Culture Mile has engaged in a wide variety of programmatic activity, including cultural events and festivals, a wide range of learning programmes delivered through its 26 learning partner organisations, and community activities to engage local residents in creativity. It is also the location of several major capital projects, including the movement of the Museum of London to a new site in West Smithfield, the transformation of Beech Street tunnel, and the development of the proposed Centre for Music. Culture Mile is understood to support the ambitions of the City Corporation as a whole and complement existing cultural programmes and landmarks.

In 2017, Culture Mile commissioned the 'Creative and Enterprise Innovation Research' report, which explored the role of creative enterprise in the area and highlighted the potential for Culture Mile to become a new 'Creative Innovation District' for London. Mapping research found a significant creative industries sector in the City of London: in 2016, 1,790 creative businesses employed 34,650 people (7.2% of employment) and contributed £2.7 billion GVA to the economy; and the creative sector is growing at a faster rate in the Square Mile than anywhere in the UK: in 2010-2016, employment rose by 88% (vs 46% across London), and the number of creative firms increased by 98%.

4.2 Mapping of Creative Industries Firms

We built on previous research to analyse the presence of the creative industries within Culture Mile. In total, we identified 564 creative industries firms registered and active within the area, employing approximately 7,026 people.[69] These findings are based on baseline data received from Culture Mile and the City of London Corporation and Companies House filings which were manually cross-checked to eliminate duplicate or inactive business data. Totals exclude freelance workers active in the area which are known to constitute a significant proportion of the sector's workforce.

Figure 3 Creative industries firms in Culture Mile



Sources: Baseline data from Culture Mile and the City of London Corporation, 2019 Companies House business data.

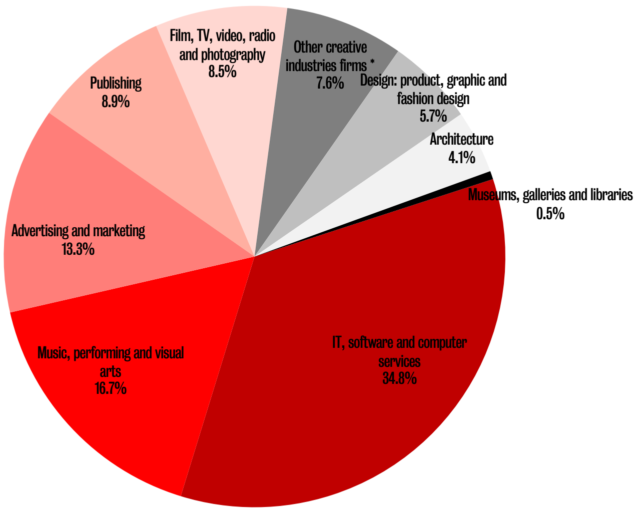
[69] Mapping was limited to 235 individual postcodes located within the boundaries of Culture Mile, excluding creative industries located nearby within the City of London or neighbouring boroughs of Camden, Islington, Hackney, and Tower Hamlets. Notable clusters of nearby creative industries firms include architecture and design in Clerkenwell, jewellery makers in Hatton Garden, and IT, software and computer services in Old Street. This work is intended to build on previous mapping studies completed by BOP Consulting and Publica in 2018 (BOP Consulting and Publica, *Creative Enterprise and Innovation Research*, commissioned by Culture Mile, 2018.)

Creative industries firms are present across Culture Mile, but clusters of firms can be identified around Smithfield Market, Long Lane and London Wall (see Appendix 1 for further detailed mapping of firms by postcode location and subsector). These are often found within or around shared offices and co-working spaces, including Two London Wall Place (86), and One London Wall (36), WeWork Moor Place (35), 150 Aldersgate (28), and Innovation Warehouse (25).[70] The vast majority (90.8%) of firms are microbusinesses, employing ten people or less.

By categorising these firms into the nine creative industries groupings, as defined by DCMS, we find that the majority of the creative industries in Culture Mile are represented by IT, software and computer services (34.8%); music, performing and visual arts (16.7%); and advertising and marketing (13.3%).[71] These are also the top three employers in the area, accounting for approximately 71.1% of creative industries workers in the area. All creative industries subsectors are represented within Culture Mile to varying degrees, with the exception of crafts.

Figure 4 Creative industries firms in Culture Mile by DCMS Creative Industries Group (n=564)

Creative Industries Group	No. Firms	% Total Firms
IT, software and computer services	196	34.8%
Music, performing and visual arts	94	16.7%
Advertising and marketing	75	13.3%
Publishing	50	8.9%
Film, TV, video, radio and photography	48	8.5%
Other creative industries firms *	43	7.6%
Design: product, graphic and fashion design	32	5.7%
Architecture	23	4.1%
Museums, galleries and libraries	3	0.5%
Crafts	0	0.0%
Total	*564*	-



*Sources: Baseline data from Culture Mile and the City of London Corporation and 2019 Companies House business data. * Creative industries firms with no registered SIC code or categorized under a primary SIC code outside of the DCMS Creative Industries Groups identified through desk research as being based in Culture Mile.*

[70] From looking up individual firms' activities online, our understanding is that a number of firms at 1 London Wall and 2 London Wall may have 'virtual offices' for administrative purpose mainly and do not in fact maintain a physical office. See next page for more detail.

[71] For the purposes of this study, the 'creative industries' are defined in line with the DCMS definition, comprised of 31 individual 4-digit SIC codes across 9 industry groupings: Advertising and marketing; Architecture; Crafts; Design: product, graphic and fashion design; Film, TV, video, radio and photography; IT, software and computer services; Publishing; Museums, galleries and libraries; and Music, performing and visual arts.

Within the IT, software and computer services subsector, the majority of firms are IT consultancy (51%), followed by commercial (29%) and entertainment software development (7%). The total number employed in the subsector is approximately 2,876, with two firms employing over 250 people. The average (mean) company size within the subsector is 15.

Within the music, performing and visual arts subsector, the majority of firms are categorised by artistic creation (46%), followed by the performing arts (18%), and sound recording and music publishing activities (16%). There are nine firms categorised as providing support to the performing arts, at least two of which have known relationships with a Core Partner or are located on its premises. In total, the subsector employs approximately 509 people, five per firm on average.

Advertising and marketing firms comprise 64% advertising agencies, 27% public relations and communications, and 9.5% media representation services. The subsector employs approximately 929 people, with an average of 12 per firm.

Most areas demonstrate a mixed ecology of creative industries subsectors, although some industry-specific clusters can be identified, including music, performing and visual arts south of the Barbican Centre around London Wall; and IT, software and computer services around Smithfield Market and Long Lane, home to Innovation Warehouse, a co-working and incubation community for digital high-growth start-up businesses.

Having analysed the locations of registered companies, we estimate that 20-30% of the 564 creative industries firms identified in Culture Mile are registered across three 'virtual office addresses' meaning some of these firms maintain an office elsewhere, while some are mobile by nature (e.g. a self-employed TV production professional) and do not have a physical office, while keeping an administrative address in Culture Mile. While this suggests that there should be an adjustment to the total number of firms with physical presence in Culture Mile, the mapping methodology of this study relies on Companies House data, therefore we have not adjusted the total number to keep the methodology consistent with mapping of other district case studies. The task of *precise* capture of *physical* locations of creative businesses that are mobile by nature, and even more so in the circumstances inflicted by COVID-19, remains beyond the scope of this exercise, although this likely difference in company registration addresses and actual places of work or physical offices suggests a need for more accurate data capture in creative industries on national, regional, and local levels to facilitate analyses like this one.

By calculating Location Quotients (LQs) for each subsector in Culture Mile we can understand their relative concentration compared with the City of London, London and the rest of the UK. An LQ is a metric of agglomeration used to measure a given area's degree of specialisation in a specific industry. It is calculated by dividing the share of a sector in one area by the share of the same sector in a comparative location. When the LQ is greater than one, the area's share of the sector in question is larger than its share of all industries. When an LQ is below one, the area's share of the sector is smaller than the area's share of all industries. If the LQ is one, then that area's share of the sector exactly matches its share of all industries' activities.

In Culture Mile we find some concentration of certain subsectors of creative industries (see Figure 4 below, colour coded to aid interpretation). When compared with national firm distribution, advertising and marketing, publishing, music and performing arts, and museum, galleries and libraries indicate above average concentration within Culture Mile. Compared with London, which itself shows the highest concentration of creative industries in the country (LQ 1.78), publishing and museums, galleries and libraries both show evidence of clustering. And, relative to the immediate vicinity within the City of London, architecture, publishing, museums, galleries and libraries and design: product, graphic and fashion subsectors all have LQs greater than one. Unsurprisingly perhaps, given that its boundaries were drawn to encompass pre-existing cultural institutions, the highest level of specialisation within Culture Mile relative to the surrounding area in the City of London are museums, galleries and libraries.

Figure 5 Measure of firm concentration (LQ) in Culture Mile by creative industries subsector relative to the City of London, London and the UK

Creative Industries Group	City of London	London	National
Advertising & Marketing	0.89	0.69	1.30
Film, TV, Radio and Photography	0.96	0.25	0.61
IT, software and computer services	0.55	0.36	0.56
Architecture	1.25	0.43	0.60
Publishing	1.52	1.23	1.97
Music & Performing Arts	0.95	0.51	1.16
Museums, galleries & libraries	2.28	1.11	1.28
Design: product, graphic and fashion	1.28	0.33	0.59
Total Creative Industries	*0.78*	*0.43*	*0.76*

Sources: 2019 Companies House business data and 2019 Office of National Statistics, UK Business: Activity, Size and Location data.

4.3 Anchor Cultural Organisations: Institutional Data Analysis in Culture Mile

We have used transactional data showing institutional records of amounts paid for goods and services provided by locally based creative industries firms and freelancers to identify the level of direct supply chain interactions between anchor cultural organisations in Culture Mile and creative industries located in the district. Overall, the analysis of available transactional data for three out of four anchor cultural organisations (Barbican, Guildhall School of Music & Drama, Museum of London) shows that there is a limited volume of direct supply chain relationships between anchor cultural organisations and local creative industries.

Museum of London spend analysis for the three most recent years (January 2017 to December 2019) shows a total number of 16 transactions made to local creative industries firms for a total amount of under £43,000. Three of these payments were made to other anchor cultural organisations in Culture Mile, representing 16% of the total transaction value. The remaining 84% of the total transaction value were spent on goods and services provided by local suppliers listed as creative industries firms, including artist and performer fees to two creative companies resident at the Barbican Centre, design, consultancy, and artist fees. There was no year on year growth in the spending on creative industries services and products locally.

When looking at the Museum of London transactional data for the wider local area (within the City of London and adjacent areas and beyond the immediate Culture Mile area), a much higher number of transactions and total amount paid for goods and services has been recorded. However, this spending is not specifically on creative industries' goods and services, but on suppliers from other industries.

The combined transactional data for the Barbican and Guildhall School of Music & Drama for the past three financial years – filtered by SIC and postcode to only include creative industries suppliers in the Culture Mile area – shows a total of 13 transactions. Seven of these were paid to Barbican resident creative companies, with 87% of the total transactional value paid to the resident orchestra and one of four anchor cultural organisations, LSO.[72] 0.81% of the total transactional value spent locally towards creative services and products went to five other creative businesses in the area, including a film/video production firm, a music charity, an event production company, a local arts venue, and a picture framing

[72] The creative companies that are based at the Barbican Centre are: London Symphony Orchestra as the resident orchestra (and the LSO Live record label); Associate Orchestra, BBC Symphony Orchestra; Associate Ensembles the Academy of Ancient Music and Britten Sinfonia, Associate Producer Serious, and Artistic Partner Create; artistic associates Boy Blue Entertainment, Cheek by Jowl, Deborah Warner, Drum Works and Michael Clark Company.

service. This demonstrates that, other than LSO and resident companies, Barbican and Guildhall School of Music & Drama's direct economic spend on local creative industries is relatively insignificant.[73]

The non-transactional data provided by the Museum of London indicates recent networking opportunities for engagement by cultural organisations and creative industries, such as workshops and conferences hosted by the Museum of London and other local venues.

The 2019 study of the non-ticketed Barbican Centre visitors (visitors who have not come for a ticketed event) provides interesting insights into the most common uses of the Barbican building and reasons for visiting.[74] Most relevant to this inquiry is the finding that 14% of non-ticketed visitors came to the Barbican to work or study. For those at the Barbican for professional purposes, it is mainly so they can work remotely (42%), for a business meeting / event (28%), or to study (25%). This group was also found to be most engaged with Barbican's ticketed events among all other types of non-ticketed visitors (e.g. those 'killing time' or Barbican estate residents). Two in five (38%) 'professional' visitors planned to spend more than 4 hours at the Barbican during their visit – significantly more so than other non-ticketed visitors. While the study does not specify visitors' professions to be able to analyse the creative industries workers in isolation, the consultation undertaken in the course of this study shows that creative professionals have used public spaces at the Barbican building both for leisure purposes and to conduct business meetings.

4.4 Summary of Consultation Findings

The consultation methods used in Culture Mile included individual interviews conducted by phone and video conferencing, online surveys – one fielded to creative industries professionals and another to anchor cultural organisations staff based in Culture Mile, and a virtual focus group with six creative freelancers based in Culture Mile. In total, 59 representatives of creative industries firms and freelancers and 43 members of staff across four anchor cultural organisations took part in the consultation.

Figure 6 Culture Mile Consultation

	Anchor Cultural Organisations Staff	Creative Industries: Firms and Freelancers & Other	Total individuals consulted
Culture Mile	43	59	102

[73] Barbican Centre and Guildhall School of Music & Drama share a financial management/accounting system hence the data is combined for the two organisations. The nature of transactions shows, however, that the major proportion of those is attributed to the Barbican Centre.

[74] Non-ticketed Visitors at the Barbican, January 2019, by Futurethinking. Provided by the Barbican Centre staff.

In our line of inquiry and analysis – combining analysis of the institutional data (above) and consultation results – we identified five key interaction areas between the four anchor cultural organisations and creative industries firms and freelancers in Culture Mile, corresponding with those identified through the literature review. These are summarised below showing the strength of each type of observed interorganisational relationship between anchor cultural organisations and local creative industries.

Figure 7 Observed types of relationships between anchor cultural organisations and creative industries in Culture Mile [75]

Local creative professionals as customers of cultural organisations

Almost all creative industries consultees enjoyed coming to events at the Barbican, using its public spaces (central courtyard, cafes, foyer) for socialising and work meetings, and attending exhibitions and events at the Museum of London. At least half of consulted creative industries professionals working locally went to events at cultural 'anchors' often; others did that occasionally when there was a specific event of interest to them:

- "I greatly enjoy the Barbican facilities as well as the concerts that proliferate the City Square Mile." – a freelance professional in local creative industries;

- "I am looking forward to visiting the City again after lockdown – it is one of my favourite parts of London, especially The Barbican, alongside Tate Modern" – business owner of a creative industries professional service firm.

When asked about their existing links to local creative industries, anchor cultural organisations largely see themselves as providers of cultural events to local creative professionals; of facilities to conduct partnerships; and of opportunities for partnerships.

[75] Based on results of consultation conducted in April-August 2020 and analysis of institutional data.

Some locally based employees and owners of creative businesses also commented that they tend to spend their free time and socialise elsewhere to allow for a change of scenery from their place of work.[76]

While many of the creative industries professionals consulted commented on having enjoyed events at local anchor cultural venues, the focus of the 'anchors' has largely been in bringing visitors to the area and serving diverse communities of East London, Greater London, and beyond. There is not yet a coordinated effort by the anchor cultural organisations to engage with local creative industries workers. In contrast, realising their access to resources and infrastructure, anchor organisations seek partnerships with creatives and communities in London that may benefit from such partnerships (and are otherwise lacking access to creative coproduction or participation).

Placemaking impact and area branding

Creative industries professionals see anchor cultural organisations in Culture Mile as contributing to the attractiveness of the area, adding more 'character' and liveliness to an otherwise highly corporate financial district. The impact of the anchor cultural organisations on the character and perception of the local area has been described as:

- "[The proximity to] cultural organisations elevates our brand" – owner of a local advertising and marketing firm;

- "They [anchor cultural organisations] contribute to the sense of community and character of the area, attract likeminded people and act as hubs. The more of these organisations in an area, and the bigger the variety, the more I feel at home and the more excited I am to be part of the area" – employee of an anchor cultural institution;

- "Impact work/life balance and wellbeing" – owner of a local creative consultancy business.

Creative industries professionals predominantly indicate they consider the anchor cultural organisations to be valuable assets of the local area and find these organisations relevant to their own work even if they have no direct supply chain interactions. According to some consultees working in design, media, theatre and film production, being close to cultural venues helps with generation of creative ideas (by attending events or exhibitions) and is a learning experience that is defined as 'inspirational' and 'supportive of experimentation'. As put by one consultee, a freelance designer and local resident, "I'm not directly impacted by these organisations, but I get holistic inspiration from seeing their posters and exhibitions".

[76] These observations were collected in relation to experience of the local area and cultural venues prior to the beginning of COVID-19 lockdown in 2020.

Barbican Estate and Golden Lane Estate within the Culture Mile area have – according to the residents consulted – a high concentration of creative professionals and a strong sense of community and belonging. While residents acknowledged that they benefit from the proximity of cultural organisations on their doorstep (specifically, Barbican Centre), they have at the same time commented on deeper engagement with their resident community and the area than with any specific local cultural organisation. There is also a perceived lack of clarity by some around the purpose of Culture Mile (as a formalised initiative) and its benefit to the local community generally, and creative industries professionals in particular. Some of the consultees commented that they viewed the public programmes implemented by Culture Mile so far being 'window dressing' and believed there has been a lack of genuine engagement either by Culture Mile or any of its core partner cultural organisations. To quote one of the consultees, a resident of the Barbican Estate: "It would be great to have an acknowledgement that we are part of collective [local] scene."

Cross-sector knowledge exchange

Cross-sector knowledge exchange has been mentioned by some consultees as happening on an ad-hoc basis through informal networks and by attending events at one of the anchor cultural organisations. Specifically, graphic designers commented on "learning from exhibitions at the Barbican" and a professional in stage design and digital production acknowledged "the experimental nature of some of Barbican's programming helps find new ideas and learn from the best in the field". Informal collaborations and skill-sharing have also happened occasionally among those connected to Guildhall School of Music & Drama – either as faculty members or recent graduates; according to one of the graduates consulted: "Commonality in the industry is that work and life are not separated – people go to events a lot, exchange experience."

Consultees pointed to their interest in having access to structured or regular opportunities to collaborate with other creative professionals and cultural organisations in the area but not being aware of such opportunities or sources of information about them.

Hyper-local supply chain relationship

Many of the consulted anchor organisations staff cited lack of awareness of the local creative professionals (firms and freelancers) relevant to their work. To quote one of the staff members at an anchor cultural organisation: "If I were more aware of the local creative industry firms and freelancers, I could potentially involve them in the development of shop products and themes to give a better reflection of the Culture Mile area. Development of shop products takes place all year round, but I would estimate engagement on a specific project taking place twice a year."

Apart from Barbican artistic associates who have a close relationship to the arts centre, are commissioned by the Barbican and oftentimes have grown out of a Barbican-led initiative, none of the local creative firms consulted have had a direct supply chain relationship with any of the anchor organisations (as also identified in the transactional data analysis above). In the course of research and consultation, we found few local residents who are either directly employed by one of the anchor organisations (e.g. LSO) or who have collaborated on a creative project with one of the anchor organisations or Culture Mile. The co-presence of global cultural institutions with local creatives in the immediate community creates some predictable tensions where the anchor organisations may be seen as focusing on their national and international collaborations and not on the neighbouring community of creative freelancers and businesses.

Partnerships and collaboration

Most consultees from the creative industries felt a lack of transparency and communication on behalf of cultural anchors and a lack of engagement with the (hyper) local creative sector within the boundaries of Culture Mile. Those consulted did not have a clear understanding of how they might collaborate with either of the anchor cultural organisations and some cited instances when they could not establish a line of communication with anchor cultural organisations in the Culture Mile area. Some respondents indicated the anchor cultural organisations are perceived as 'high end' and 'intimidating' and suggested deeper outreach and engagement is required as Culture Mile appears to serve primarily these anchor organisations and the Corporation of London's property development interests in the area. In the words of an employee of a local advertising and marketing firm, "They [anchor cultural organisations] are rightly revered and valued, but that can make them feel intimidating and less accessible. I'd love for there to be more focus on outreach and accessibility." Creative industries professionals are interested in finding ways to engage with Culture Mile: "There are many ways Culture Mile could be promoted so that there is better awareness, opportunities and engagement that could also enhance business relations," said an owner of a local creative marketing firm.

Production and programming partnerships are the strongest amongst the four anchor organisations and between each of the organisations and their regular artistic and programme associates elsewhere (in the UK and internationally). On a local level, strong multi-year relationships have been developed between the Barbican Centre and the artistic associate companies that are based at the arts centre. When asked about local interactions and partnerships, the staff of the anchor cultural organisations most often refer to partnerships and ongoing collaboration with one or all other anchor organisations. These relationships have been significantly strengthened by the Culture Mile initiative that facilitates interorganisational cooperation and planning.

It is important to note that the character of local creative industries, their diversity, and therefore their ability to establish relationships, is impacted by the nature of the Culture Mile district itself. High property and office rental prices have been cited as making the Culture Mile area (and the City of London) prohibitively expensive to many freelancers and creative businesses. For example, in the residential market as of June 2019, the Barbican estate had the highest average monthly rent in London for studios and one-bedrooms – £2,154 and £2,486 respectively.[77] In mid-2020, the average property sale price for a flat in London was £511,060, and for the Barbican it's £1,017,875.[78] Although the office rental rates in the City of London are lower than in West End and Midtown areas, they are still above the London average, and 20-30% higher than some other areas with similar office property market values, e.g. London Docklands.[79]

In the course of consultation, many commented on the fact that they are not aware of any affordable, accessible, or attractive spaces within Culture Mile for creative experimentation, collaboration, and creative practice more generally. The Culture Mile area is seen as being dominated by high-cost and highly formalised office and commercial property that does not encourage creativity and is not attractive to artists. However, the most rapidly growing subsector of the creative industries (and, arguably, most profitable of those considered within this study) – software design and computer services – is most likely to be able to work in the spaces currently offered within Culture Mile, specifically recent coworking office developments.

---

[77] Source: https://www.simplybusiness.co.uk/knowledge/articles/2019/09/average-rent-in-london-guide-for-buy-to-let-landlords/, accessed 12 August 2020.

[78] Source: https://www.zoopla.co.uk/house-prices/browse/barbican/?q=Barbican%2C%20London%20EC2Y, accessed 12 August 2020.

[79] Sources: https://www.carterjonas.co.uk/-/media/files/research/public/2019-q3-commercial-rent-free-period-guide.pdf; https://www.carterjonas.co.uk/-/media/files/research/public/2018-commercial-mp-q2-2018-map.pdf; https://www.statista.com/statistics/873480/london-office-cost-of-rent, accessed 12 August 2020.

5 Comparative Analysis

We selected five districts across the UK as comparators: Better Bankside, London; Dundee Waterfront; Newcastle-Gateshead Quays; Bristol Harbourside and Salford Quays. These five districts were selected as they offer a diverse range of geographic and historic contexts and each has active anchor cultural organisations alongside creative industries sectors of various sizes and concentrations. Some of these clusters grew 'organically', while others developed as urban regeneration and business development districts. As with the analysis of Culture Mile, we focused in particular on the three major types of relationships that emerged from the literature review: supply chain interactions; knowledge exchange, skills development and networking; and area branding and placemaking. We explored and described the types of relationships that exist, conditions for stronger and weaker interorganisational links and specific types of relationships, and commonalities and differences between the districts.

Below we provide analysis of each of the comparator districts and discuss in detail the factors causing such variation. Better Bankside Business Improvement District (BID) area in London has the highest concentration and diversity of creative industries firms, while Dundee Waterfront has the lowest.

Figure 8 Percentage of creative industries and Location Quotient (LQ) across all comparator cultural districts relative to London and the UK

Area	CI percentage	National LQ	London LQ
UK	11%		
London	19%	1.78	
Culture Mile	8%	0.76	0.43
Bankside	21%	1.96	1.10
Newcastle-Gateshead Quayside	11%	1.00	0.56
Dundee Waterfront	5%	0.50	0.28
Salford Quays	11%	1.04	0.59
Bristol Harbourside	9%	0.85	0.48

Sources: 2019 Companies House business data and 2019 Office of National Statistics, UK Business: Activity, size and location data.

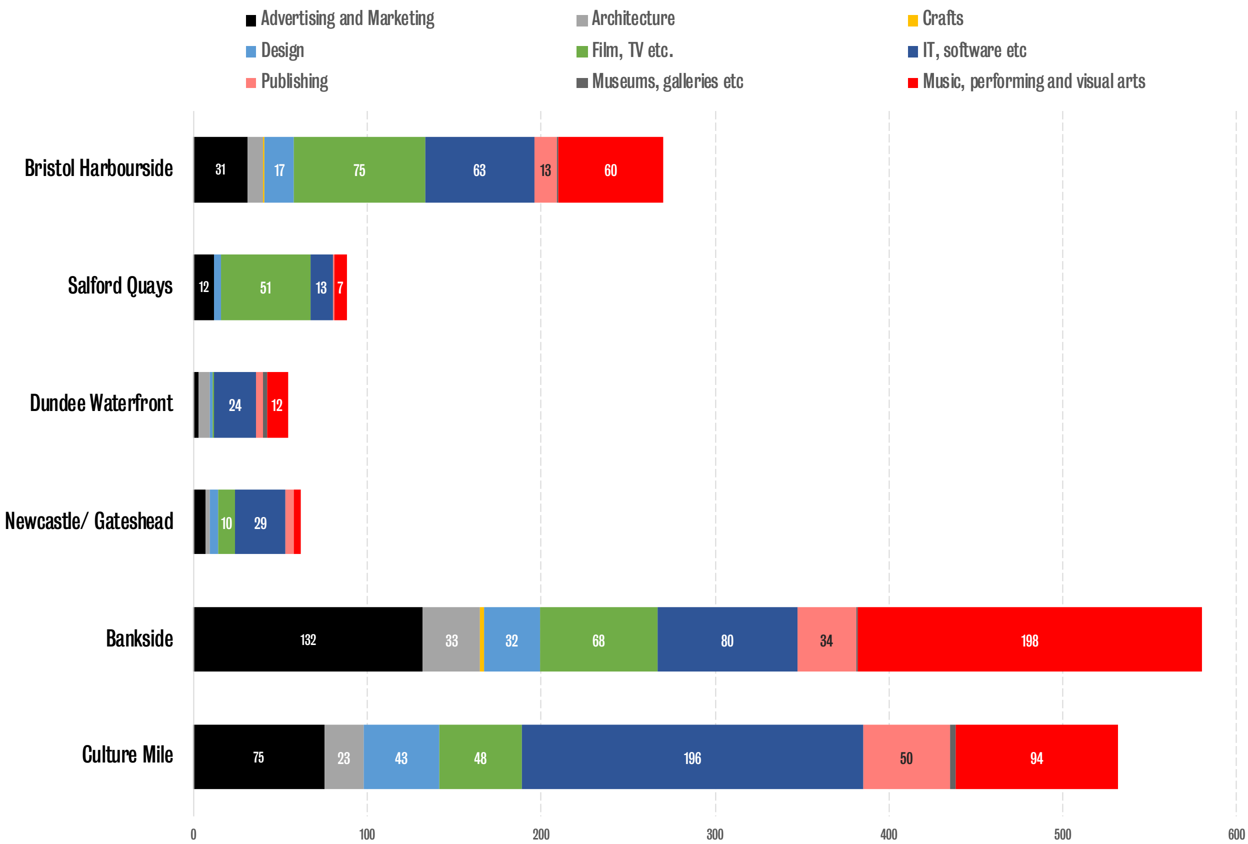
The analysed cultural districts also vary in concentration of creative industries subsectors: some have a higher concentration of certain types of businesses due to intentional policy and anchor organisations supporting particular creative subsectors (e.g. software engineering, media, TV, and film in MediaCity / Salford Quays in Salford), others have grown organically over the years (e.g. a theatre cluster in Bankside or film & media production in Bristol Harbourside).

Figure 9 Creative industries subsector concentration at each of the studied cultural districts

	Culture Mile	Bankside	Newcastle-Gateshead Quayside	Dundee Waterfront	Salford Quays	Bristol Harbourside
Advertising and Marketing	13%	23%	11%	6%	14%	11%
Architecture	4%	6%	3%	11%	0%	3%
Crafts	0%	0%	0%	0%	0%	0%
Design	8%	6%	8%	4%	5%	6%
Film, TV etc.	9%	12%	16%	2%	58%	28%
IT, software etc	35%	14%	47%	44%	15%	23%
Publishing	9%	6%	8%	7%	1%	5%
Museums, galleries etc	1%	0%	0%	4%	0%	0%
Music, performing and visual arts	17%	34%	6%	22%	8%	22%
All Creative Industries	8%	21%	11%	5%	11%	9%

Sources: 2019 Companies House business data and 2019 Office of National Statistics, UK Business: Activity, size and location data.

Figure 10 Creative industries subsector shares across all comparator districts by number of registered firms



Source: 2019 Companies House business data.

The anchor cultural organisations in each district are predominantly not-for-profit visual arts and performing arts organisations. Some of these have been developed as part of a coordinated regeneration effort (e.g. Sage Gateshead and Baltic in Newcastle-Gateshead or V&A Dundee in

Dundee), while others have pre-dated such efforts (e.g. Live Theatre in Newcastle). One exception to anchor cultural organisations considered as part of this study is BBC MediaCity in Salford which is not a 'cultural anchor' per se, but is an area-defining creative industries anchor, discussed below alongside The Lowry arts centre.

Figure 11 Anchor cultural organisations at each of the studied cultural districts

Cultural District	Cultural Anchor	Art Form
Culture Mile	Barbican	Multi-Arts
	Guildhall School of Music & Drama	Performing Arts
	London Symphony Orchestra	Music
	Museum of London	Museum/Heritage
Bankside	Tate Modern	Visual Art
	Shakespeare's Globe	Performing Arts
Newcastle-Gateshead Quayside	Sage Gateshead	Performing Arts
	Baltic Centre for Contemporary Art	Visual Art
	Live Theatre	Performing Arts
Dundee Waterfront	V&A Dundee	Visual Art / Design
	Dundee Contemporary Arts	Visual Art
	Dundee Rep Theatre	Performing Arts
Bristol Harbourside	Arnolfini	Visual Arts
	Colston Hall	Performing Arts
	Spike Island	Artistic Production
	We the Curious	Science
	M Shed	Historical
	Bristol Old Vic	Performing Arts
	Watershed	Film / Multimedia
Salford Quays	The Lowry	Performing Arts
	BBC MediaCity	Film, TV, Media

5.1 Comparator Cultural Districts Analysis: Key Observations

The size of a city where a cultural district is located – and the creative industries businesses, freelancers, and cultural organisations co-located in a district – affects the strength of local connections. Stronger connections grow organically in smaller-scale cities, where the size of the local creative industries sector is also smaller than in larger metropolitan areas.

Mapping of creative industries in the cultural districts shows occasional clustering of individual subsectors (e.g. software developers) around shared workspaces or hubs. We did not observe any subsector clustering in the immediate vicinity of anchor cultural organisations analysed.

Level of engagement of cultural anchors with local creative industries varies significantly from one to the next and is not consistent for those co-located in the same district. In terms of the types of relationships that exist between cultural organisations and creative industries locally, the evidence gathered through consultation suggests skill-sharing and knowledge exchange are often built organically over time.

Employers in creative industries often cite that they position their proximity to cultural venues as part of the attraction of the area to their employees. Creative professionals tend to participate in cultural events and use spaces / facilities of cultural venues both for work meetings and in their spare time. At the same time, creative professionals often do not perceive cultural organisations as potential partners, clients, or collaborators.

Universities, where present, have played an active role in shaping the area(s) and relationship building between cultural organisations and creative industries and developing a skilled workforce for both cultural organisations and the creative industries.

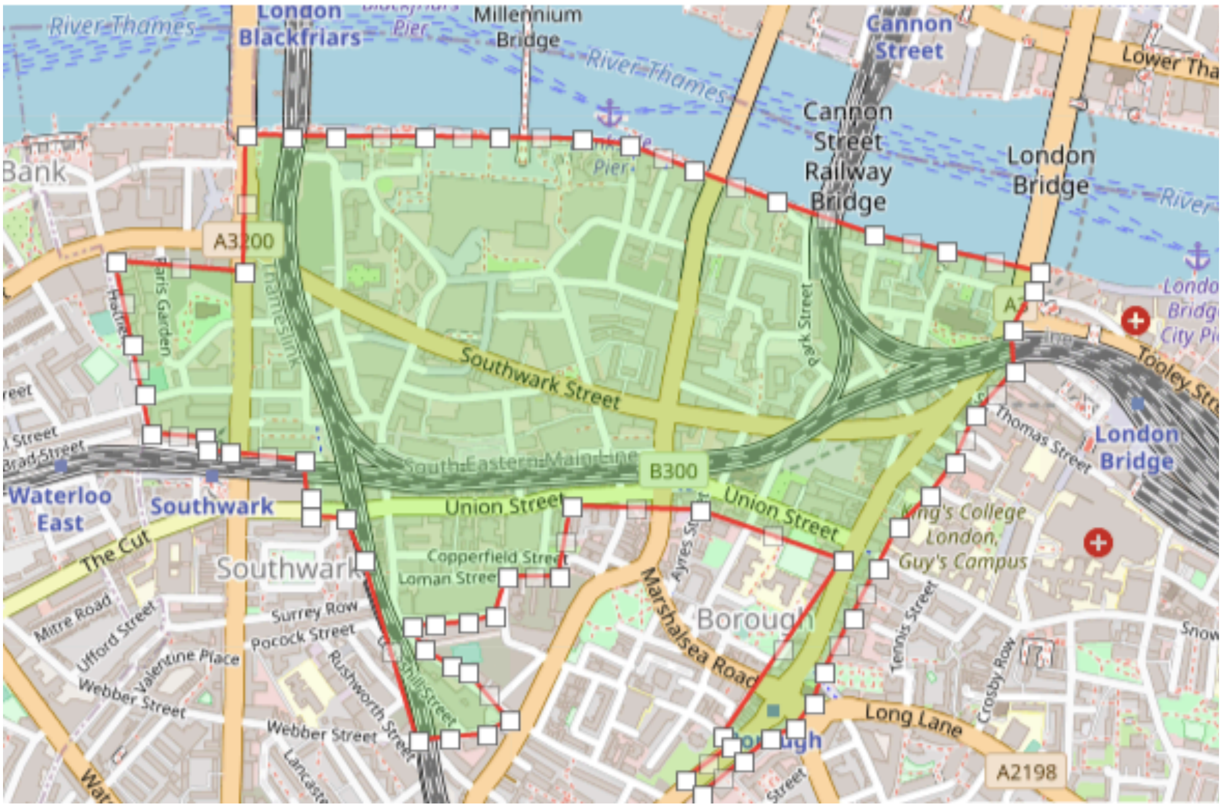
By their nature, the districts analysed in this study are occupied by significant levels of commercial properties – high rental rates and cost of living within the district and surrounding city centre location mean that creative workers often live elsewhere and may not have a regular relationship to the area.

The implications of COVID-19 have had a great impact on place-based relationships in cultural districts, especially for creative industries firms who often find they do not necessarily need to come back to the 'place' where they worked unless there is strong dependence on infrastructure or in-person collaboration, given the mobile nature of their businesses and ability to reduce costs by not maintaining office space.

Changes brought upon working lives and business activities by COVID-19 have also solidified virtual networks, though those tend to be city or region-wide and not necessarily tied to individual areas. These networks however often include only cultural organisations (e.g. forums of not-for-profit arts organisations or performing arts sector organisations) or subsectors of creative industries rather than a mix of both.

5.2 Better Bankside

Figure 12 Map of surveyed area in Bankside ("Better Bankside BID"), Southwark, London



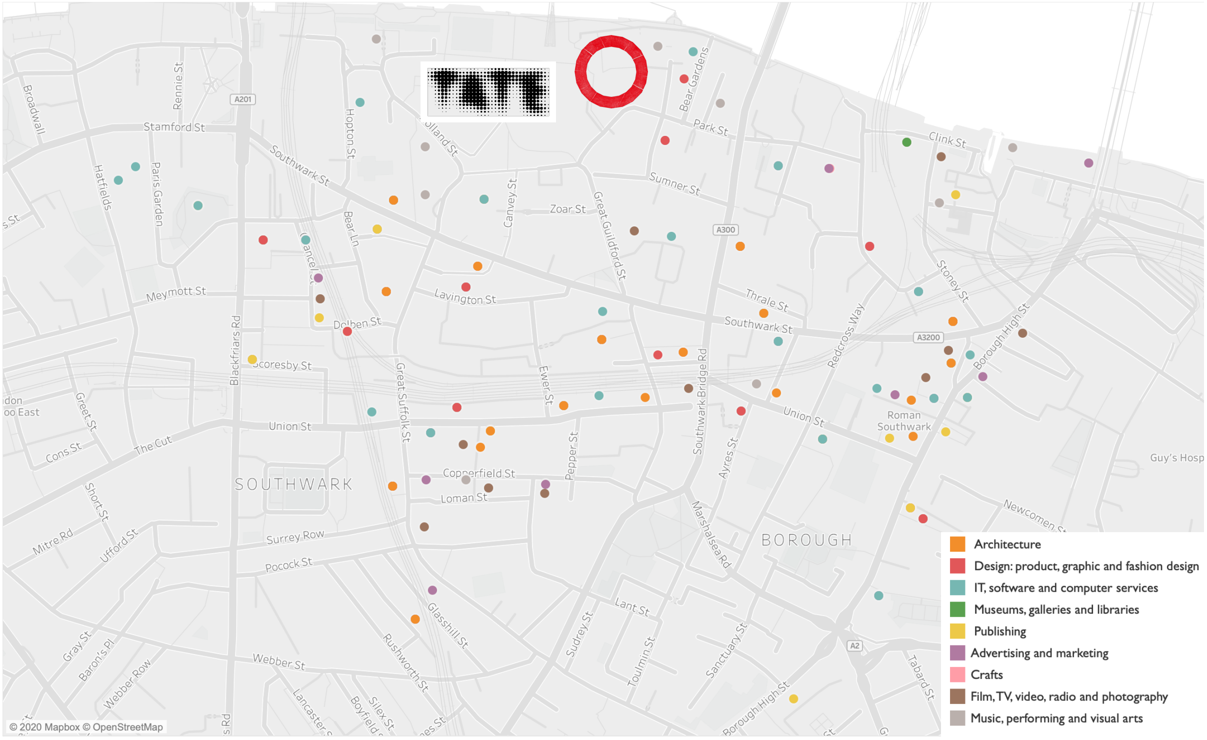
Source: FreeMapTools.

Bankside, separated from the City of London by the River Thames, has a long history as a district of entertainment, inns and taverns, and theatres. Since the 1990s, the area has undergone active regeneration and is now attracting a footfall of nearly 30 million a year. Bankside's major attractions alone: Borough Market, Shakespeare's Globe, and Tate Modern, collectively welcome over 21 million annually.[80] Better Bankside is a Business Improvement District established in 2004 by the Act of Parliament, one of the first ones to be established in the UK. Better Bankside BID is an independent, business-owned and led company, which seeks to improve a given location for commercial activity. Better Bankside's members are over 900 companies – including those in cultural and creative industries – in the BID area who pay its annual 'levy'. Many of these are heavily involved in the governance of the company. Better Bankside works to improve the neighbourhood through a programme of place management and place marketing strategies. The Bankside area accounts for a high concentration of

[80] Source: better Bankside, 2018 figures. Footfall figures by ShopperTrak.

creative businesses and organisations (21%), the largest subsectors of which are music, performing arts, and visual arts (34%) and advertising and marketing (23%).

Figure 13 Firms by creative industries subsector, Better Bankside BID, Southwark, London



Source: 2019 Companies House Data.

The regeneration of Bankside and revitalisation of its creative and cultural sector are often linked to the spillover impact of the development of Tate Modern art gallery on the site of Bankside Power station, initiated in 1994. Tate Modern has attracted over 40 million visitors since it opened to the public in 2000, welcoming 5.8 million visitors in 2018.[81] A study into the Tate Modern's economic impact in the first five years of the gallery's operations estimated that 21,300 people were employed in cultural industries in the areas of Bankside, Bermondsey and South Westminster, generating £606 million in annual incomes.[82] Local cultural and creative industries professionals consulted in the course of this study commented on the creation of a 'cultural powerhouse' south of the river with the opening of Tate Modern (and its expansion in 2016), Shakespeare's Globe (mostly seen as a tourist attraction), and the recent opening of The Bridge Theatre by Tower Bridge.

Bankside is home to over 20 actively operating theatres (Young Vic, Old Vic, Union Theatre, Southwark Playhouse, and others), alongside rehearsal studios and performing arts support services, creating an

[81] Tate Modern website; Association of Leading Visitor Attractions.

[82] Southwark Council, September 2015.

active network and a theatre 'district' in Central London outside of the West End. There is also a vibrant visual arts scene, with independent galleries, art centres, and multi-purpose art spaces (such as Jerwood Arts Space on Union Street offering a public visual arts programme alongside rehearsal studios for theatre, TV, and film professionals).

In recent years, the food industry has grown rapidly, with the epicenter at the Borough Market, and many restaurants and cafes within walking distance of the market and other major attractions. While it took some time for the waterfront regeneration to move deeper within the borough of Southwark, Bankside has grown in the past 20 years to accommodate new hotels, office developments, education and cultural facilities.

Knowledge exchange, skills development and networking

Bankside's cultural sector – specifically theatre and visual arts – is a thriving and well-connected community.

Artists and arts professionals employed by theatres and visual arts galleries in the area enjoy good networking opportunities and support from their neighbours. Initiatives like the cultural space use at former rail arches (Union Street arches) have created mini-clusters of artistic activity attracting regular footfall. This activity also spills out into the wider Bankside area through shared programming and seasonal outdoor festivals. While there is a sense of collaboration within the cultural sector there is little direct interaction between the creative industries and cultural organisations. Neither deliberately seeks to work with local suppliers (from creative or cultural industries) while enjoying 'creative cohabitation'.

The cultural organisations in the area collaborate informally and organically in sharing resources, connections, and knowledge. Those semi-formal networks tend to develop in subsectors, e.g. among theatres, design firms, or creative marketing and advertising agencies.

Area branding and placemaking

Among the creative industries and smaller cultural organisations based in the area, there is a strong sense of vibrancy and character of the place, and a perception that anchor cultural organisations have had a positive effect on such vibrancy over recent years.

While creative business owners and employees acknowledge that being close to major cultural attractions is not a decisive factor in their choice of Bankside as a location for business, they admit the benefits and 'spillover' effects these have on the area. As Bankside is highly saturated with creative industries, there is also a sense of professional network, while it is also an attractive area for after-work socializing. Creative business owners have admittedly moved here from other parts of London due to excellent transport links and attractive office space.

Those organisations that have been located in the area for over 20 years have noted the change they have seen through regeneration effort and the arrival of visitors to major attractions (Tate Modern, Shakespeare's Globe), with new workspaces, education facilities, and accommodation arriving and bringing in new groups of residents and smaller businesses, and increasing footfall in the area.

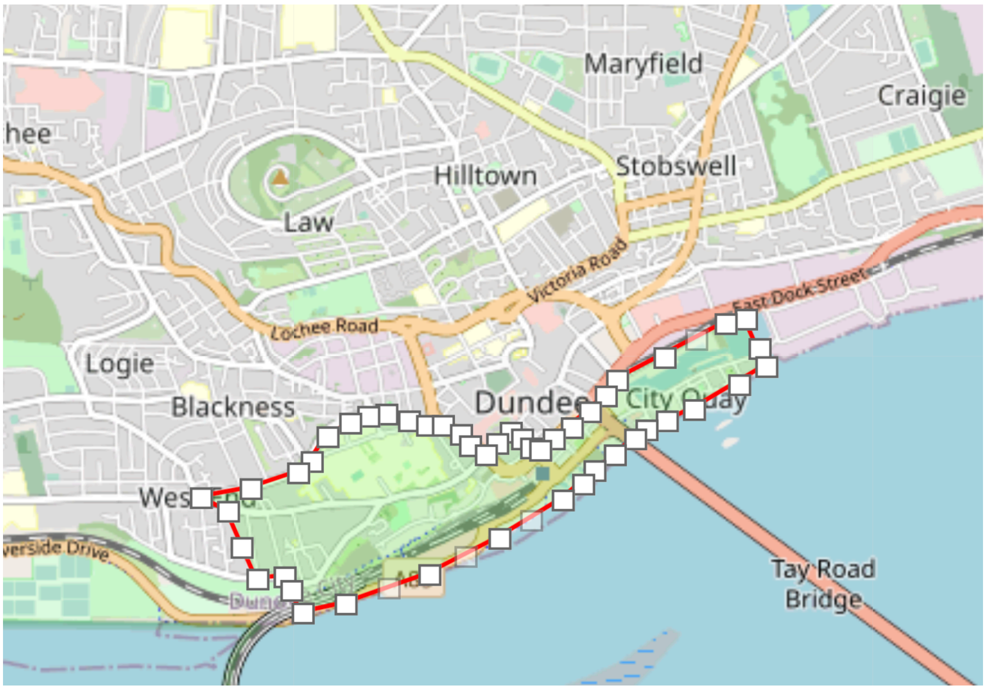
A combination of good transport links, historic character, vibrant cultural and night life, attractive office space, and tourist accommodation make Bankside an appealing place to visit and work. However, regeneration has led to growing housing costs pushing out many older residents.

All of the factors above are important in attracting creative businesses and their workers to the area, with Better Bankside's activities also contributing to the brand of the place and sense of community. Co-working and flexible working spaces (such as buildings run by Fora and Workspace) bring in many creative businesses looking for smaller and attractive offices in Bankside.

While regeneration has brought many positive economic effects (job creation, tourism), it has also forced some local residents – particularly creative freelancers – to move to more affordable parts of London, so very few still reside in the area. This speaks to Bontje and Musterd's identification of incompatibilities between not-for-profit and for-profit priorities; with the formulation of Bankside as a *business* improvement district, this suggests creative workers in this area of both a high concentration of commerce and not-for-profit cultural activity experience exceptional precarity. Some local creative workers also observed uneven development across Bankside where some buildings and new blocks of flats stand half-empty due to the transient nature of their residents (e.g. high-end student accommodation).

5.3 Dundee Waterfront

Figure 14 Map of surveyed area in Dundee

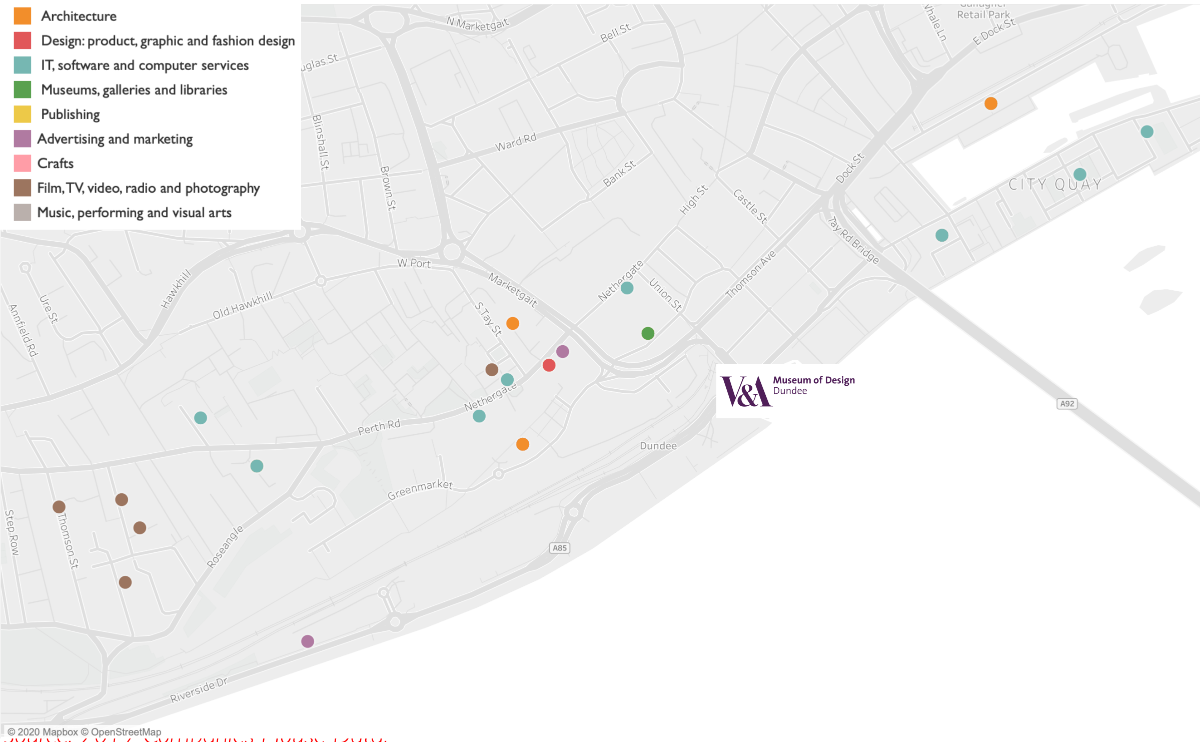


Source: FreeMapTools.

A mid-sized city located on the East coast of Scotland, Dundee's process of culture-led regeneration began in the 1990s, developing a vibrant and growing creative industries sector that is at the heart of the city and its ongoing success in computer games, design, higher education, and arts and culture. Named a UNESCO City of Design in 2014, the city has revitalized its industrial legacy and historical publishing industry to develop a mixed and growing cultural and creative offering.

The ongoing £1 billion redevelopment of Dundee Waterfront has attracted additional investment, with the V&A Dundee, as well as new office spaces for creative companies, residential developments, hotels, green space, a re-developed port and airport, and a 5G testbed currently undergoing funding approval. Directly parallel to the historical city centre, much of the city's pre-existing cultural offering is located here, such as Abertay University, and its renowned Centre for Excellence for Computer Games, and Dundee University and its art school, Duncan of Jordanstone College of Art & Design (DJCAD); Dundee Contemporary Arts (DCA), and The Dundee Repertory and Scottish Dance Theatre. Companies House data indicates there are a total of 993 firms registered in this area, with 59 categorised as creative industry firms (5.9%). Excluding five companies registered to three anchors, the largest creative subsectors are IT, software and computer services (44.4%), music, performing and visual arts (22.2%), and Architecture firms (11.11%).

Figure 15 Firms by creative industries subsector, Dundee Waterfront



Source: 2019 Companies House Data.

Knowledge exchange, skills development and networking

Dundee benefits from a strong network facilitated externally from anchor organisations, and well-known and accessible meeting and socialising spaces for the industry.

Dundee's thriving cultural ecology was developed and strengthened by pre-existing networks, such as Creative Dundee, founded in 2008, which provides visibility, connections and events for local creatives. On the whole, the city benefits from a strong network connecting large and small cultural organisations and creatives, with one consultee remarking that there is a resilient "pay it forward model … the city really gives time and care to this sector." This confirms Currid's observations of the necessity of informal relationships, in addition to face-to-face interactions, also noted by Michael Storper and Anthony J Venables, which were easily facilitated in a city of such a size, with a well-connected backbone and a variety of known spaces to meet.[83] In addition to Creative Dundee, consultees universally note that the DCA functions as an important hub for creatives – the bar and restaurant are popular locations for meetings, both professional and informal – and the DCA's Print Studio and Cinema's audiences are generally drawn from the broader creative sector.

[83] Michael Storper and Anthony J Venables, 'Buzz: face-to-face contact and the urban economy,' *Journal of Economic Geography* 4:4 (August 2004): 351-370.

Anchor organisations generally hire permanent staff and freelancers locally, but through word-of-mouth or ease of collaboration due to the small size of the city.

Anchor organisations generally hire full-time employees and contract freelancers locally, often exclusively Dundee-based with the exception of V&A Dundee's recruitment pool drawing beyond the city and region. However, even where employment or contracted work is hyper-local, it is not the result of a Dundee-focused procurement policy, but a product of word-of-mouth relationships and preference for city-based firms/ professionals for ease of collaboration. In particular, the V&A delivers their Learning programme entirely through a team of 25 Dundee-based freelancers. However, some consultees have expressed that while the V&A's opening and 2019 exhibition *Videogames: Design/Play/Disrupt* attracted attention and involved significant collaboration across the city's various creative subsectors, this has not necessarily been sustained across all departments. In general, this robust ecosystem is largely due to the interconnectedness and small size and scale of Dundee, with one consultee from the City Council reflecting that "there isn't a critical mass of activity [in comparison to Culture Mile] … but there is so much cross-organisational partnership and collaboration because there is an expectation of generosity and sharing." This opinion is shared by individuals from businesses and anchors.

Creative firms have strong and varied relationships with co-located 'cultural anchors'.

Creative firms on the whole established both long-term and ad hoc working relationships with anchor organisations; for example, creative studio Biome Collective, made up of independent contractors, frequently collaborate with all three anchors on projects, both contractually and to share equipment. Significantly, consultees highlight productive informal relationships for ideation and knowledge exchange. A creative industry consultee identified a number of projects that had come about from informal conversations with technicians at one of the anchors. There are also formalised avenues, such as the Dundee Design Month and NEoN initiatives. The latter, a digital arts festival, bridged many of the organisations, businesses and professionals in the city, with events held across multiple venues concurrently, inviting site-specific commissions from a range of local participants. This relationship is less strong *across* creative subsectors; although the R&D video games cluster at Abertay is extremely productive, they have only significantly partnered with the V&A Dundee for a video game commission, and plans to co-deliver a Design for Business Programme with the V&A Dundee did not progress as of yet. However, the local nature of their funding programme means that projects are co-designed, delivered and tested with local firms and residents – a prototype game design project at Abertay was tested amongst audiences at V&A-organised family workshops, but at other community venues in the city.[84]

The presence of two universities also had a significant effect on cross-sectoral collaboration.

Dundee is home to two universities, the University of Dundee and its art school, Duncan of Jordanstone (DJCAD), and Abertay University, the location of a world-class video games course, centre and research & development incubator programme. Students from these universities make up a significant proportion of employees and audiences of the cultural organisations in the area, in addition to being a vibrant group of creatives in their own right and consumers of local creative businesses; consultees from the artist-run GENERATORProjects note that many members of their voluntary committee are graduates of DJCAD and are also full-time and part-time employed at a number of cultural organisations in the area. The course at Abertay has a significant pull regionally and in many cases, internationally; several consultees within the video games sector cited the presence of Abertay as the primary reason in their decision to work in Dundee.

Spillover effects – economic and intangible – from the Waterfront development, however, are uneven, especially from grassroots organisations or individual freelancers.

Consultees agreed that the Waterfront development and V&A have brought significant interest to the city and its creative industries, but that direct benefits are unevenly distributed depending on the nature of their organisation or work. For example, the RRS Discovery, a popular tourist attraction docked directly adjacent to the V&A, noted that construction works had an initially detrimental effect on the ship due to its fragile nature and, although closest in proximity to the museum, are yet to formally collaborated although there are aspirations to work together in the future. Additionally, some consultees found that relationships and resources are not necessarily reciprocally shared with smaller, grassroots organisations. While individuals at anchors observed that the presence of the universities and the art school result in students being "well embedded, very rooted in the communities here", graduates of such universities have reflected that the arrival of V&A Dundee did not bring much additional professional entry-level opportunities, and opportunities to engage are largely restricted to unpaid volunteering. One consultee remarked that while "individuals at organisations are easy to meet informally, [anchors] are quite unwilling to collaborate with us … we don't really think it's well-connected beyond the immediate waterfront or with smaller groups like us." Formal interactions with anchors are perceived to be limited by certain groups of individuals, in particular graduates of the city's art schools, who find that "[their] unpaid participation in larger organisations' work is often taken for

[84] V&A Dundee, *V&A Dundee. National Lottery Heritage Fund. Final Evaluation Report, August 2019,* accessed 23 August 2020, https://www.vam.ac.uk/dundee/info/policies.

granted, and the benefits gained from the development do not reach all members of the creative industries.

COVID-19 tested the strength of these networks but also enhanced pre-existing connections.

As a direct result of the COVID-19 pandemic, a cultural partnership was formed to determine a mode of response to the current crisis, led by major cultural organisations with the participation of local creatives and freelancers. While consultees expressed that collaboration between the V&A in particular and the rest of the city's creative industries were somewhat limited post-opening, they have seen marked improvements and development of the city's pre-existing networks. One such development is the ongoing co-authorship of a resiliency strategy for the sector, as well as a city-wide Dundee Cultural Recovery Fund, led by the V&A Dundee, which will benefit the DCA, the Dundee Rep Theatre, Dundee Heritage Trust and Dundee Science Centre.

Supply chain interactions

The anchor cultural organisations are well-connected and frequently collaborate, in addition to generally being well-embedded in the immediate area.

Consultees from cultural anchors in Dundee expressed interest in collaboration, citing numerous strategic and creative collaborations. This is partially due to the strong experience of local engagement at the anchor organisations: for example, the Dundee Rep Theatre's origins as a community theatre founded in the interwar period, resulting in long-term collaborations between organisations and a keen sensitivity to locale. More recently, the V&A Dundee's pre-opening programme, designated for the creative industries, was intended to capitalise on, and encourage integration within, pre-existing connections. The V&A's opening 3D Festival, for example, involved co-produced events and projects with local creative firms such as Biome Collective, groups at Abertay University, Open/Close Dundee, a public art trail, and Beano Studios.[85]

The specialisation of certain creative firms precludes more interaction with anchors but is matched by a general enthusiasm to engage with co-located firms.

Consultees in specialised professions also noted that the nature of their work precludes extensive collaboration with co-located anchors, but noted that the size and scale of Dundee is extremely conducive to strong working relationships with other creative firms. For example, a scientific imaging software company, also headquartered at the University of Dundee, has worked with the DJCAD/School of Life Sciences gallery space at the Discovery Centre by providing images for their exhibitions. Similarly, although the Rep Theatre employs a high number of freelancers from the region and the

[85] Ibid, 60.

country, they noted that few come directly from the area due to a perceived industry specialisation away from the performing arts within the city's freelancers.

Area branding and placemaking

From the perspective of other large cultural organisations, anchors do contribute positively to the branding of the city, however, it is acknowledged that the city benefits from sophisticated networks that predate the Waterfront redevelopment.

Anchor organisations positively contribute to the overall branding and reputation of the city – consultees noted the V&A, in particular, had been useful in retaining employees, attracting employment and investment: "the Waterfront has brought a 'buzzy' feel to the area". This is in marked difference to early fears voiced by John McCarthy that Dundee's culture-led regeneration would risk homogenising the city's unique image and identity.[86] McCarthy signposts the promising reputation of the games industry in Dundee, alongside a strong reputation in three distinct sectors – the visual arts, research / higher education, and, now, technology. A consultee from a long-established anchor noted that the V&A "has had a pull down to the Waterfront … but because all the anchors are a 10-15 minute walk from each other, so in many ways, all the areas are one … you can connect it all really easily."

[86] John McCarthy, 'Promoting Image and Identity in 'Cultural Quarters': The Case of Dundee,' *Local Economy* 20:3 (August 2005): 280-293.

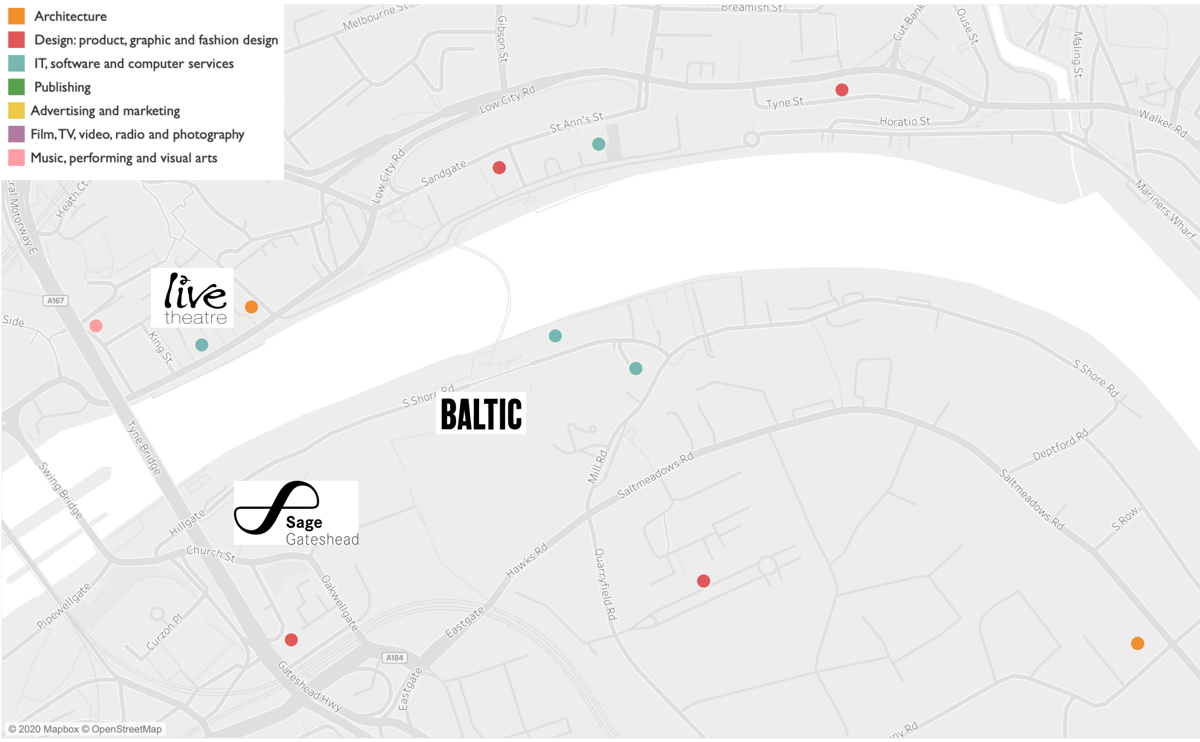
5.4 Newcastle-Gateshead Quays

Figure 25 Map of surveyed area in Newcastle-Gateshead

Source: FreeMapTools.

Culture-led regeneration in Newcastle-Gateshead began in earnest in the 1990s, focusing on the old industrial riverside site that had brought industrial revolution-era economic growth – such as transport of raw materials from the River Tyne, as well as heavy engineering and manufacturing. A period of dereliction followed in the mid-twentieth century until City Council regeneration efforts centred on the area beginning in the 1990s. Newcastle Gateshead remains an important economic (and now, increasingly, cultural) hub for the North East of England. Alongside iconic buildings housing world-class cultural organisations such as Sage Gateshead (opened in 2005) and BALTIC Centre of Contemporary Art housed in a former grain warehouse (opened in 2004), structures such as Antony Gormley's Angel of the North (completed 1998), and the Millennium Bridge (completed 2001), have contributed to the area's cultural reputation and increased commercial investment. The city is also home to two major universities, Newcastle and Northumbria, both of which have creative degree programmes, and in which the latter is particularly strong. Companies House data indicates there are a total of 551 firms registered in this area, with 70 categorised as creative industries firms (12.6%) clustered across 11 locations. Excluding eight companies registered to the anchors, the largest subsectors are IT, software and computer services (46.8%), film, TV, video, radio and photography (16.1%) and advertising and marketing (11.3%). Of the IT, software and computer services firms, the majority were firms in business and domestic software development (69%), followed by video games and other leisure or entertainment software development (24%). The area was formed out of a new connection between the previously independent areas of the Newcastle town proper, the traditional centre of the city, and Gateshead, which provided land for redevelopment.[87]

Figure 26 Firms by creative industries subsector, Newcastle-Gateshead Quayside [88]



Source: 2019 Companies House Data.

Consultation has confirmed that while relationships between anchor cultural organisations in the Quayside area – the BALTIC, Sage Gateshead and its tenant orchestra Royal Northern Sinfonia, and Live Theatre (founded in 1973, predating the newer regeneration efforts) are strong, there is limited evidence of consistent and strategic collaboration with local creative businesses and professionals.

Supply chain interactions

Anchor organisations employ staff and contract freelance work locally. However, the institutional scale of anchor organisations prohibits a 'naturally occurring' creative collaboration that can be observed among freelancer and smaller businesses.

---

[87] Newcastle City Council, *Gateshead Quays,* 2010, 12.

[88] This case study isolates the Quayside area to be an appropriate spatial comparison with Culture Mile; but recognises that connections span the entire city, given its small size and the non-geographic nature of relationships. As such, there is limited discussion of, for example, other major cultural organisations across the city and the region, and Newcastle and Northumbria Universities, in addition to creative hubs such as the Ouseburn, which are outside of this bounded area.

The anchor organisations surveyed largely employ and contract freelance work locally; a key source of creative businesses for work such as graphic design and app development is the Northern Design Centre in Gateshead, a hub of creative and design businesses in a 5,560-square meter building. In addition, Sage Gateshead's size and iconic role make it a large employer of local creatives, and it also has high profile community and creative learning programmes targeted towards the city's residents. Unlike the venue itself, Sage's resident orchestra the Royal Northern Sinfonia (RNS) employs their musicians on full-time contracts and these musicians are not necessarily from the area. A consultee from BALTIC noted that the talent pool for their particular department sees a lot of overlap with other cultural organisations in the area, "there is often a lot of internal local shuffling … [with a] really dynamic local ecology of roles," resulting in a strong sharing of skills and ideas in this particular group of roles. However, there is limited evidence this is shared across the creative subsectors represented in the Quayside area and that participated in consultation.

All anchors in this area note that their programming focus is not specific to the immediate Newcastle-Gateshead area, but has a regional focus.

All three anchors have strong national and international programming, although with some regional focus – in particular, Live Theatre's productions reflect and amplify the lived experience of communities in the North East. One consultee from an anchor noted that artistic collaboration between co-located anchors and creative businesses is "not extremely regular and not particularly strategic … ad-hoc, not as a regular strand of work." Outside of contractual and formalised supply chain relationships, creative activity is not particularly embedded in Newcastle-Gateshead, with anchors operating separately from their immediate neighbours and not often collaborating.

Knowledge exchange, skills development and networking

There are limited spaces for informal and formal gatherings in the Quayside area, precluding more organic relationships and engagement between co-located anchors and creative businesses.

Both Sage and BALTIC were cited as informal and formal meeting and events venues. For example, a recently formed COVID-19 industry response support group convenes at Sage, and BALTIC's café is a convenient meeting place for other professionals in the area, both within and outside the creative sector, likely to do with the lack of other major catering facilities in the immediate vicinity. However, consultees generally reflected that "in comparison to London and Glasgow, there are [less] spaces and opportunities for the creative industries to mingle naturally." This is in reference to both the Quayside area and across the city as a whole.

A division between grassroots / community organisations and anchor organisations is persistent.

Consultees not employed by Sage note that cost is a high barrier to entry for participation in Sage's creative learning programmes which are often held up as a paradigmatic example of engagement with young creatives and students in the area. Although largely specific to Sage, but also relevant to BALTIC, consultees from creative businesses and freelancers note that the prominence of these anchors results in weaker relationships with grassroots cultural assets and workers – one consultee from the music industry explains that there is a "cultural division between perceived 'high-brow' and informal arts." There are in fact limited relationships between the commercial creative industries and Sage – they explain that "… the two operate very differently and have different values … there is a bit of a distance between the Sage and, for example, rock musicians that prefer to perform elsewhere, but this seems to be because of a cultural division, and not politics... these guys simply don't want to perform [at the Sage]." Similarly, a consultee from BALTIC reflects that there is a noticeable lack of mid-sized and grassroots organisations. They are sensitive to the fact that between BALTIC as an exceptionally well-funded anchor and small cultural assets, "there isn't the same provision for artist studio space, or independent, experimental spaces."

Stronger relationships to education were observed in Live Theatre as a result of its mixed sources of revenue, allowing it to fund collaboration and experimentation, but this is not overwhelmingly within its local ecosystem – neither Quayside nor the city.

Unlike Sage and BALTIC, Live Theatre has a mixed model of revenue generation as a major landowner and early occupant of the Quayside. Live Theatre purchased its adjacent land and buildings and developed over 1,500 square metres of office space across Live Works and The Schoolhouse; Live Garden, a public park and performance space; and Live Tales, a children and young people's writing centre. There are over 20 different tenants in its office units which are not all creative businesses. Revenue from this project, Live Works, is partly used to fund the Theatre's free educational programme. This programme is regarded by one consultee to have been instrumental to experimentation and practical experience early in their career as a musician, and an outlet for their work. However, as a major producing theatre, employees are not always local, and the consultee from this organisation did not reveal any significant strategic collaboration with local creatives: Live Theatre contracts around 300-500 freelancers every year, of which only 20 to 30 who deliver educational programmes are from Newcastle and Gateshead. Aside from programming specifically targeting their local audience, the consultee explained that their projects attract collaborators nationally, and occasionally internationally. Productions have somewhat of a regional focus, with a strong roster of those originating from the North East and Scotland. One freelance creative producer explained that their work is conducted with individual writers rather than the Theatre itself; for example, a project around a touring production with a writer at Live Theatre but that has since stalled as a result of the pandemic.

The voluntary Newcastle Gateshead Cultural Venues partnership allows for strong working relationships between major organisations, extending beyond the immediate Quayside area.

All three anchors under consideration are members of the Newcastle Gateshead Cultural Venues (NGCV) voluntary partnership, made up of 10 cultural organisations in the region, which was founded to formalise long-term partnership and unify the public assets of the city. Consultees noted that this is particularly effective for commercial partnerships, such as sharing box office (ticketing) services or offering corporate discounts, sharing data and conducting audience research. One consultee, who is employed by a NGCV member, noted that collaboration tends to be limited to organisations of similar sizes, especially when determining and driving projects that include non-member organisations and initiatives, and that more could be done to develop more strategic relationships with the local creative industries.

Freelance consultees and those from creative businesses indicated their preference for independent networks outside anchors, such as New Creators North, and Tyne & Wear Cultural Freelancers, that are not necessarily spearheaded by anchors nor specific to Newcastle-Gateshead. In particular, the popularity of online platforms that allow freelancers to find clients outside of their city, if not globally, means that co-located freelancers are not necessarily restricted to local work and may find work further afield more flexible and opportune.

Area branding and placemaking

Mid-career freelancers surveyed did not express a particularly strong pull to the city and its anchors.

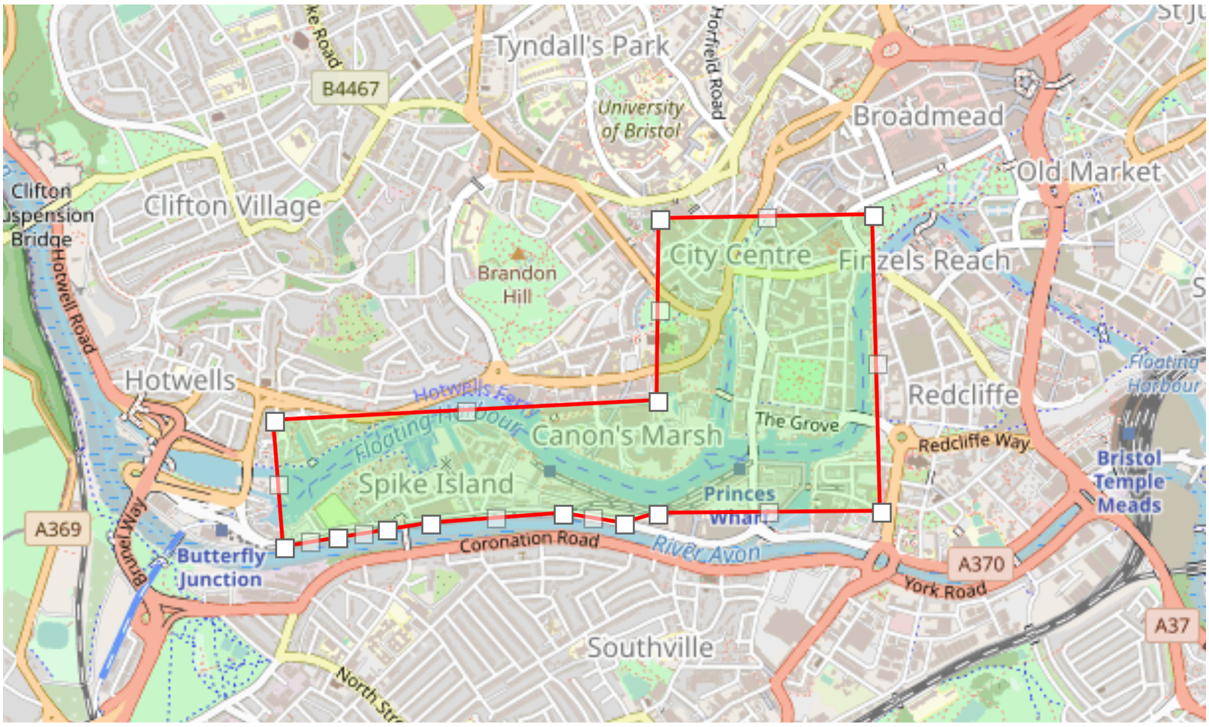
One consultee expressed a personal lack of interest in working on projects in the city – they observe a "constant re-hashing of the 'mining narrative' … it's just not personally exciting for me and not what I'm personally interested in developing. Although I am aware of networks, I don't feel the need to participate." This suggests that a well-developed network of creative workers on its own does not necessarily create strong working relationships with anchors. Regardless of the availability of opportunities, co-located firms and businesses do not feel the need to restrict their business to the city if they feel opportunities are more appropriate or interesting elsewhere. Although programming at anchors is not overwhelmingly focused on the industrial heritage of Newcastle, it is still significant that this reputation somewhat holds for, at least, the consultees surveyed, even following regeneration and development of subsectors that draw from outside its local context. Another freelance musician noted that while anchors are important and have boosted the reputation of the city, they find that they are not accessible nor truly engaged with nearby resident creatives, although noting that there are little residential spaces in the Quayside area outside of premium student accommodation. Both consultees referred to here were born in the city, and as such feel that their attachment is more social rather than professional, although appreciate the impact of the anchors in boosting the international reputation of Newcastle.

Spillovers and positive feedback loops are not shared between creative subsectors, but there is an expectation that this will change as a result of COVID-19 with an increased need to share resources not just among anchors, but between businesses of different subsectors too.

Consultees observed that there is a lack of active relationships between not-for-profit cultural organisations and for-profit creative industries, especially the tech and digital sector. One consultee remarked that "more should be done to capitalise on industries that are locally based … [there is] a feeling that all sectors don't realise they can access the digital sectors on their doorstep." There were calls from consultees that the city councils of Newcastle and Gateshead can play a larger role in bridging and cultivating such relationships, especially as organisations will likely require more attention as they seek to move their diverse programming online in innovative ways that rival live performance and experience. This would require more specialist companies to develop near the anchors that are well-versed in both the arts and their respective subsectors.

5.5 Bristol Harbourside

Figure 27 Map of surveyed area in Bristol



Source: FreeMapTools.

Beginning in the 1970s, the Bristol Harbourside area has undergone massive transformation – from dangerous and decayed industrial land to one of Bristol's primary culture and leisure attractions. This was achieved through half a century of public and private partnership and investment to create a mixed-use environment comprising culture and heritage attractions, open public space, water sports and boating facilities, commercial activities and housing developments.

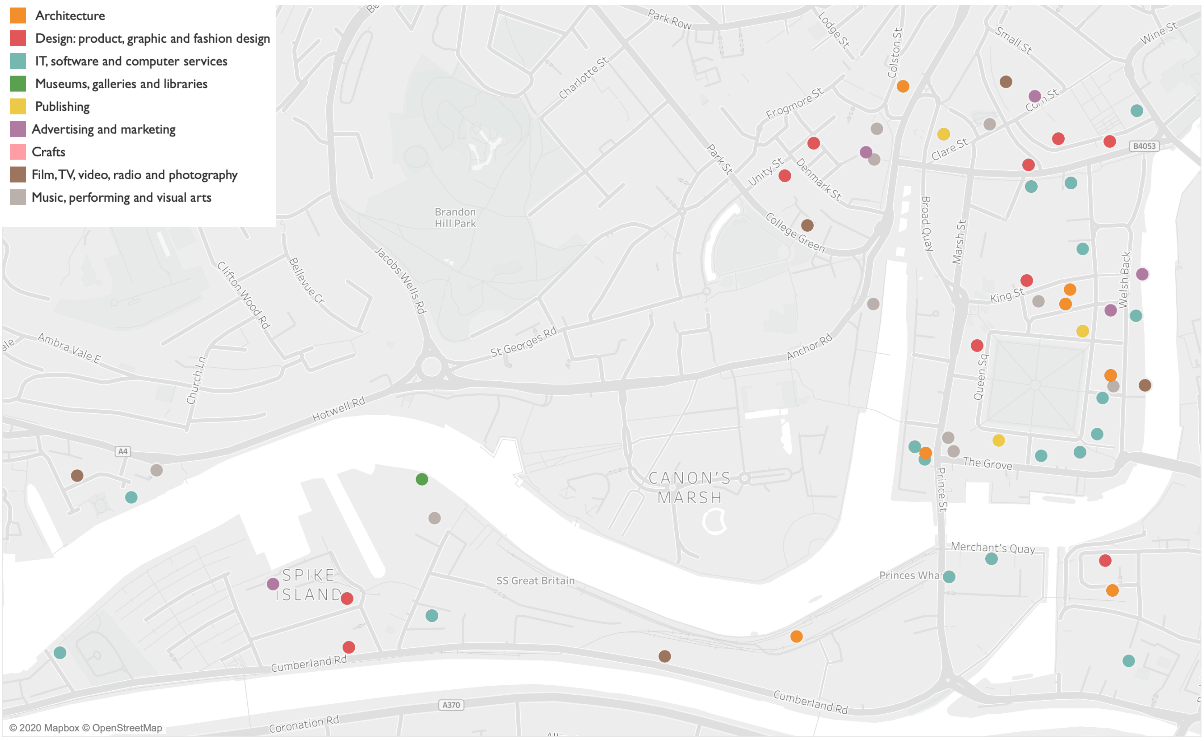
The Harbourside has a rich maritime history dating back almost 1,000 years. During this time, it became one of the most important commercial ports in the country and a global centre for shipbuilding and trading activities. It played a significant role in the Transatlantic slave trade in the 16th and 17th centuries, something which was once again highlighted in the Black Lives Matter protests in Bristol during the summer of 2020. In 1975, the Floating Harbour was closed to commercial traffic, by which time it had become cluttered with redundant warehouses, timber yards and railway sidings as it struggled to adapt to a post-industrial economy. In the same year, the opening of the Arnolfini art gallery in Bush House, a former tea warehouse, marked the beginning of the area's transformation shaped by various public-private initiatives with arts and culture at their core.

Today, core cultural tenants include cultural cinema, workspace and incubator, the Watershed; contemporary arts centre Arnolfini; social history museum M Shed; interactive science centre We The

Curious; the recently redeveloped Bristol Old Vic theatre; the SS Great Britain steamship and museum; artist studios and community centre Spike Island; multi-genre concert venue Colston Hall; and historic boatyard Underfall Yard. It's also the stage for the annual Bristol Harbour Festival, a celebration of Bristol's maritime history and contemporary culture which welcomes approximately 250,000 visitors every year.[89]

Mapping creative industries firms currently active in the Bristol harbourside area, we find a total of 270 firms, mostly in Film, TV, video, radio and photography (75 firms, 28% of total); IT, software and computer services (63 firms, 23% of total); and Music, performing and visual arts (60 firms, 22% of total). We consulted with creative industries firms and workers across these subsectors to inform our findings, including leading film, media, and entertainment companies based in Bristol Harbourside.

Figure 28 Creative industries firms by subsector, Bristol Harbourside



Source: 2019 Companies House Data.

There is a strong collaborative culture and can-do attitude visible across the cultural and creative sectors in Bristol Harbourside which are mutually supportive. However, with Bristol being a relatively small and well-connected city, cultural and creative organisations in the Harbourside tend to look beyond their

---

[89] Source: Bristol Harbour Festival, official website: https://www.bristolharbourfestival.co.uk.

immediate vicinity, connecting with peers across the wider city. In this way, Harbourside can be understood as one of several cultural and creative loci that serve the city as a whole.

Supply chain interactions

Various multi-directional economic relationships exist between cultural organisations and creative industries firms but, in general, limited priority is given to the immediate Harbourside area in favour of a city-wide network.

All creative industries firms consulted said the majority of their work is not 'local', i.e. goods and services are provided to customers outside of the Harbourside area and beyond Bristol. That said, numerous examples of cultural organisations commissioning work from local creative industries firms and freelancers based within Harbourside were cited, including:

- Aardman Animation's *Animate It!* permanent exhibition at We The Curious, which also works with a range of local creatives including videographers, filmmakers, photographers and designers such as Calvium;
- Watershed commission design work from locally based firms and freelancers;
- Colston Hall works with a wide range of freelance music teachers, web designers, composers, photographers, filmmakers, and technologists from the local area;
- Arnolfini works with various local creatives including filmmakers, photographers and designers; and
- Spike Island works with creatives based within their building from various disciplines including architecture and design, while also providing employment through their Exhibition Services businesses which provides audio and visual equipment for exhibitions in the south west of England and across the country.

Several of the cultural organisations consulted, including We The Curious and Watershed, prioritise local providers in their procurement processes. However, 'local' in this context comprises Bristol as a whole and is not limited to the Harbourside area. In fact, some programmes funded by cultural organisations, including cross-disciplinary innovation work which seeks to engage diverse participants proactively seeks partners from across the city.

When analysing the flow of capital from creative industries firms to cultural organisations, we found that creative industries workers are regular patrons of nearby cultural institutions, particularly their artistic programmes. Furthermore, creative industries use cultural organisations' facilities as venues for client meetings and events therefore generating additional income. This is born out of various motivations, including practical purposes such as convenience and affordability, a desire to identify with the broader cultural and creative sector, and a sense of duty to support local institutions.

In some instances, this sense of duty toward the local cultural ecology, and the not-for-profit arts organisations within it, runs particularly deep. For example, one locally based television and film production company supported the Bristol Old, Colston Hall, and other cultural organisations by offering their services free-of-charge. They also conducted workshops and helped develop displays and exhibitions for museums in and around the Harbourside area. As described by one consultee,

> "We do mostly unpaid work… it supports the symbiosis between cultural institutions and creative industries. I feel a sense of civic or philanthropic duty to give back to Bristol, and most cultural organisations struggle and need all the help that they can get. It's good for them and good for us too I hope."

Local cultural anchors present artistic work by creatives based in the Harbourside area. Exhibitions, events and festivals across the Harbourside area showcase local creative work. These include, for example, *Making Waves* by Rusty Squid and Green Ginger at the M Shed; various Aardman Animations exhibitions at the M Shed and We The Curious; the Bristol Festival of Puppetry which includes work by Green Ginger and other puppeteers based at Puppet Place; and the Wildscreen Festival which presents work by local and international filmmakers. The Watershed and Spike Island also regularly present work by resident artists and creatives.

Creative industries workers attend anchors for both professional and recreational purposes. There is perceived value in creative industries workers engaging with local cultural anchors – even if it does not serve their business economically. Regular attendance is seen as a positive influence on their creative output and general well-being and most of the creatives interviewed regularly attend artistic programmes at anchor cultural organisations. Cafés and other open spaces at anchor institutions, especially Watershed and Arnolfini, are also used by local creative firms to conduct meetings.

Knowledge exchange, skills development and networking

There are examples of anchor cultural organisations being used as 'testbeds' for experimentation and innovation, presenting new ambitious forms of work by locally based creative industries firms.

By providing support and a platform for local artists, cultural organisations can give rise to new ideas. For example, Aardman Animations collaborated with local cultural organisations to pilot their first animation exhibitions. While these exhibitions started as a philanthropic endeavour to promote understanding and interest in animation, there was significant demand shown by audiences which led to the development of a new business model for touring exhibitions in which animation exhibitions tour internationally.

Aardman exhibitions have since travelled around the world, contributing to the firm's overall business performance.

Pervasive Media Studio, a creative studio and co-working space at the Watershed, encourages cross-disciplinary collaboration and invention which has led to new business and service offerings for its residents. Various Watershed programmes also encourage experimentation including Playable City which seeks to put people and play at the heart of the urban experience. This initiative began at the Pervasive Media Studio in 2012 when creatives from East Asia and the UK worked together to experiment and prototype new ideas for Bristol that used creative technologies to playfully rethink public space and has since expanded to eight other cities globally.

Anchors provide creative workspace, and various other forms of support, to creative industries firms and freelancers.

Spike Island, Pervasive Media Studios (Watershed), Arnolfini and We The Curious (VR Lab) all offer workspace for artists and creative businesses:

- Spike Island is home to a creative community of over 500 people occupying 72 artist studios, 20 commercial offices, and a 42-desk incubator space, Spike Design, as well as hundreds of MA/BA Fine Art students of UWE Bristol.
- Pervasive Media Studio at the Watershed hosts a community of over 150 artists, creative companies, technologists and academics, who are given access to physical and digital resources, networks and expertise at no cost, creating a unique environment for cross-disciplinary collaboration, experimentation and idea generation.
- Arnolfini shares its building with UWE and other creative and commercial businesses.
- We The Curious (in partnership with Watershed, UWE, University of Bristol and Opposable VR) hosts the Bristol VR Lab, an incubation space for VR and AR developers and designers, in one of its buildings.

These spaces also offer various levels of support through informal channels, including knowledge and expertise, physical resources (e.g. technical equipment), and networks to local creatives and have built a reputation for their generosity of time and resources.

The Watershed especially has a long history of fostering collaboration and innovation in the creative industries and as a platform for new creative technologies:

- In 1999, a partnership with the University of Bristol brought new ultra-fast broadband technology to the Watershed which enabled 17 media companies to explore how it could be applied to their industries.

- Pervasive Media Studios was founded in 2008 after a successful pilot project in which Hewlett Packard Labs offered utility computing (cloud) technology to a group of 12 animators to create new content.
- We The Curious and Watershed were both involved in the 5GUK Test Network via Bristol University which explored 5G technology through a series of experimental events that sought to uncover the potential of 5G connectivity.

Other Watershed programmes that encourage innovation and experimentation with new technologies include: REACT, VR Lab, Network for Creative Enterprise, Bristol + Bath Creative R+D, Sandbox, Creative Workforce for the Future and various fellowships and prototype awards.

Events at anchor organisations foster community and knowledge sharing, although perceived hierarchy among creative organisations in the area may preclude wider participation.

Creative industries workers in the Harbourside attend a range of events and festivals at local anchor institutions, including First Fridays at the Watershed which brings together universities, cultural organisations, creative industries, and the public sector for a free networking event. Several consultees noted their "strong catalytic effect" and their important role in the development of the cultural and creative sectors in Bristol – First Fridays are symbolic of the porous and relaxed nature of the local ecology which has a strong community feel. This, and other similar events, help local creative industries firms to meet new people, including potential clients, and seek advice or make other important connections.

Aardman Animations, Bristol Old Vic, We The Curious, and other cultural and creative organisations regularly present public workshops in the area to spread awareness of the creative sector, encourage creativity and generally support the advancement of Bristol's creative ecology.

However, one creative industries worker described the cultural 'scene' in the Harbourside area as sometimes inward-facing or exclusive, with events not always welcoming to the full breadth of the creative industries and their workers. This suggests that there may be some perceived hierarchy of creative industries sub-sectors and is related to Oli Mould's concerns about the stamping out of alternative creative assets and stakeholders, what he terms 'urban subversion', as a result of the dominance of larger institutions.[90]

Area branding and placemaking

Creative industries co-location with cultural organisations has been driven primarily by affordability, availability of appropriate space, and location.

[90] Mould, *Urban Subversion*, (2015).

Bristol Harbourside became an area of choice for creatives primarily due to its central location, availability of large floorplates in former industrial buildings suitable for creative work, and the affordability of space. Among the creative industries workers consulted, co-location with cultural organisations was not a significant factor in their decision to locate in the Harbourside, although physical proximity is said to make it easier to engage.

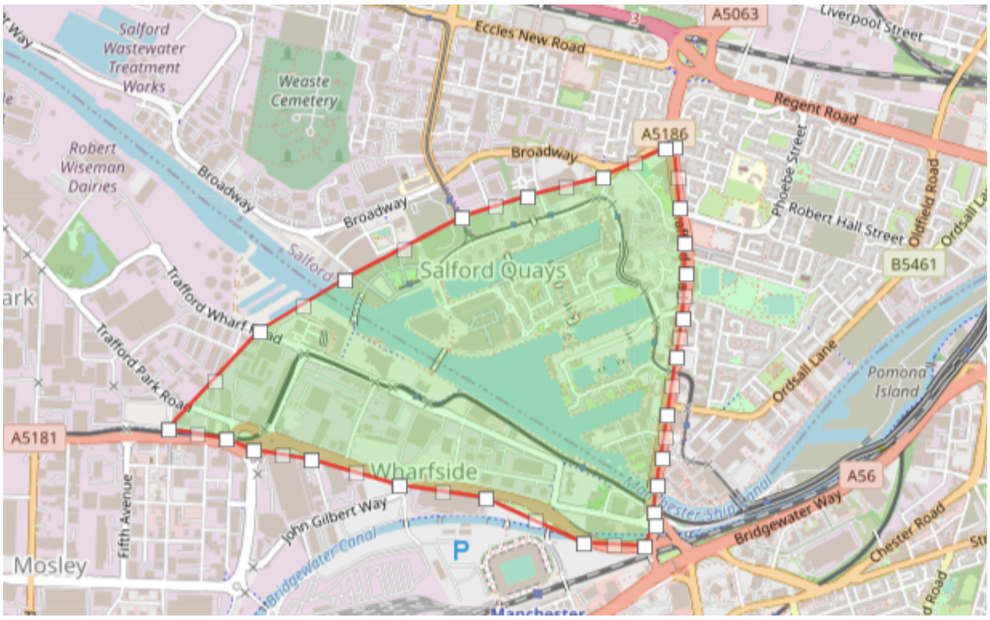
Consultees agreed that the number of creative industries firms in the area is more limited than it was previously due to increasing property prices which has caused some creatives to re-locate elsewhere. This is especially common among experimental arts practitioners which have given way to more commercially centred practices (e.g. advertising, architecture, videogames). However, affordable workspace is provided by cultural organisations in the area, including Watershed, Spike Island and Puppet Place (as described above), which helps maintain the artistic character of the area.

Universities have also played a key role in building relationships in the area.

Universities form part of the formal and informal networks within the area too. Specifically, UWE and the University of Bristol have partnered with numerous cultural organisations in the Harbourside including Watershed, Arnolfini and We The Curious, and several consultees emphasised the role that they have played in the development of Harbourside's creative ecology and reputation as a centre for creativity in Bristol.

5.6 Salford Quays

Figure 29 Map of surveyed area in Salford, Greater Manchester



Source: FreeMapTools.

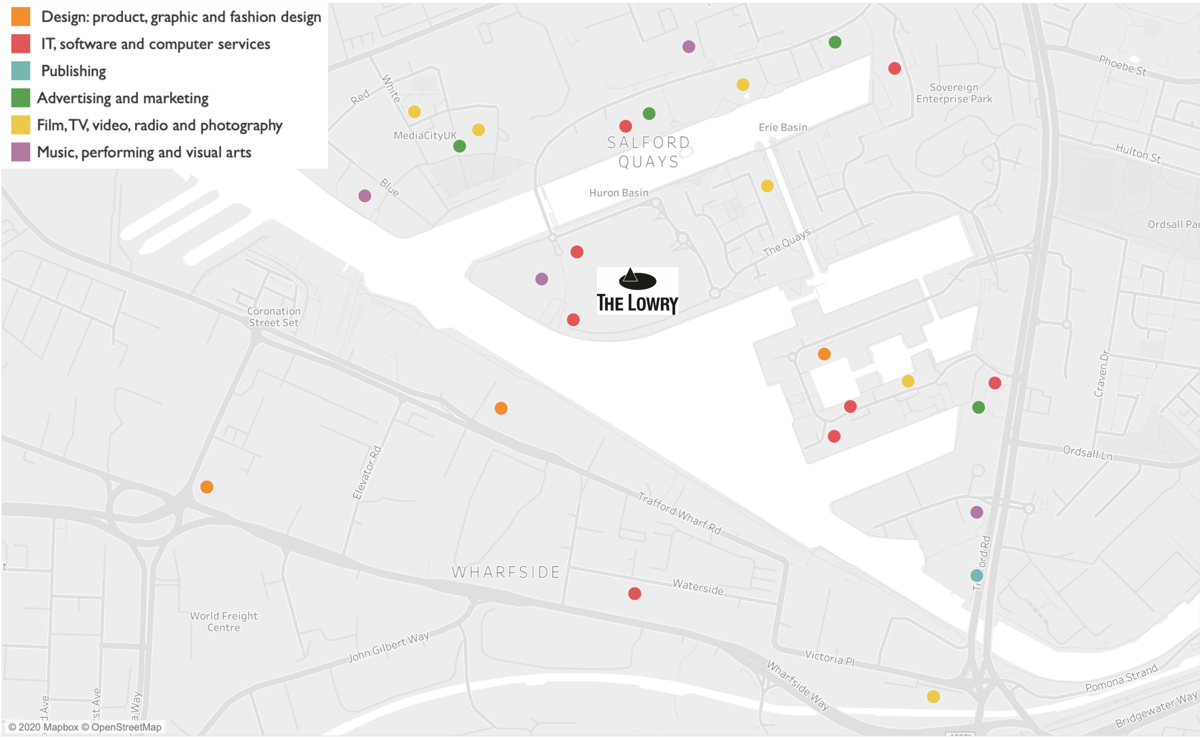
MediaCity UK and Salford Quays is a purpose-built development representing 30 years of private-public investment in Salford. Launched in 2010, MediaCity UK has grown as a technology centre now housing over 250 businesses, with over 7,000 people living and working at MediaCity.[91] The Quays area is defined by a cultural anchor, The Lowry; a media and broadcast anchor, BBC, which now employs over 4,000 people; and the campus of the University of Salford. The Lowry is the most visited attraction in Greater Manchester with almost 850,000 visitors in 2018. It helped to kick start the regeneration of Salford Quays, being one of the first big investments into the area when it opened in 2000. Until the outbreak of COVID-19 in 2020, The Lowry derived almost 95% of its funding from commercial activity through its theatres, events, bar, restaurant, café and other activities.[92] It is acknowledged for its active engagement of local artists (though not necessarily within the Salford Quays area) while also bringing high quality national and international touring acts to Salford. The residential area immediately bordering the new Salford Quays development is one of the most deprived in Greater Manchester and tensions still exist between long-term residents and 'new settlers', where some acknowledge that the new development and its anchor organisations failed to engage with local communities in meaningful ways.

[91] Source: Salford Digital Strategy, 2019.

[92] Source: Salford's Vibrant Cultural Scene - The Inclusive Economic Impact of Culture In the City Report, 2019.

As the emphasis at MediaCity UK and Salford Quays is on technological innovation (with associated technological infrastructure provided across its buildings), the area sees a high concentration of film, TV, and media businesses (59% of all local creative industries) and IT/software development businesses (15%). The Landing, a coworking office space based in the Quays, attracts tech firms with networking and professional development events; opportunities to collaborate throughout the building; and high-spec technological infrastructure. Individual creative professionals and software developers have commented, however, that the occupancy (rental) costs are prohibitive to businesses with smaller turnovers.

Figure 30 Creative industries firms by subsector, Salford Quays



Source: 2019 Companies House Data.

Area branding and placemaking

Anchor cultural organisation, The Lowry, and its partner and ancillary activities, contribute to the appeal of an otherwise largely commercial and 'bland' area.

Modern office infrastructure in Salford Quays has created a somewhat 'cold' quarter with little street life. Programmes at The Lowry and outdoor installations and events produced by its associate organisation, Quays Culture, help 'smooth' the character of the place and add vibrancy to the public realm while also bringing visitors from outside the immediate Quays area.

There is potential for Salford Quays to further animate its public spaces with cultural and civic activities.

The residents of the Quays noted the disappearance of smaller independent businesses (e.g. cafés) and the proliferation of corporate chains. They have observed the area being "dead" and lacking in activity outside the office spaces. Consultees commented that greater engagement could be achieved with local resident communities and local artists and creatives in programming the arts and cultural events and installations in the public realm. The top-down, overwhelmingly commercial and tech-heavy nature of Salford Quays has resulted in some immediate economic benefits but limited, if not detrimental, social impacts on the stamping out of non-corporatised businesses, not-for-profit or grassroots cultural activity, in favour of high growth and economic output.

Knowledge exchange, skills development and networking

Salford Quays is a 'smart city' driven by its R&D and technological potential and infrastructure. Sporadic partnerships between the cultural sector and MediaCity companies have taken place over time but there is no overarching strategy to connect creative and media businesses with the arts and cultural sector within the district.

Technological innovation is at the heart of many businesses occupying MediaCity. At the BBC, the majority of employees are in software engineering roles, not in content creation roles. While employees tend to attend some cultural events locally – at The Lowry and at nearby public plazas – it is yet unclear how stronger links can be built between the local arts and cultural sector and the R&D and tech hub. The area's key stakeholders (e.g. those at The Landing, a co-working hub for small businesses working in tech innovation) are interested in linking up the cultural and tech sectors, though that requires coordinated effort, training and professionals fluent in both worlds.

There appears to be a divide in skillset and training between the highly specialised tech businesses professionals and artists and arts professionals from the not-for-profit cultural organisations, with innovation and experimentation in technology far more advanced in the commercial creative sector.

When invited to collaborate with local cultural organisations and artists, tech firms and professionals are often expected to contribute their work pro bono or at a fee far below the market rate. This makes such collaboration challenging for small businesses in the tech sector who, in essence, need to 'donate' their time at expense of other profitable business endeavours. At the same time, there are no funding initiatives tailored to address this divide and encourage greater collaboration where professionals in the cultural sector could also have a chance to upskill in areas like digital production (e.g. AR/VR production, recorded content), software development, etc. There is an interest in such collaboration on both sides, but it requires investment to make it sustainable. As Hanna's case study of the Knowledge Quarter in

King's Cross suggests, the lack of network brokers in between disparate stakeholders – in particular, commercial businesses and for-profit cultural organisations, results in a disjointed system.[93]

Local universities have a strong role in developing industry connections and talent for the local creative ecology.

The University of Salford, and its departments directly related to the skills required by local employers (TV and media production, performing arts), has had an important role in training and talent development for local creative companies, while also offering opportunities for partnerships and collaborations. The students have taken professional apprenticeships and are able to undertake mentored projects in the industry as part of their studies. Such programmes are hosted by The Lowry, BBC, and The Launch enterprise start-up based at The Landing coworking space, among others. The students who find employment in the local area often stay connected with the university and its activities and reengage later in mentorship and training roles.

[93] Hanna, *Spaces to think* (2016).

6 Conclusions and Recommendations

6.1 Conclusions

Looking at the three types of relationships between cultural organisations and creative industries that we set out to explore in the context of a cultural district, we found that – while they vary across the studied districts and reflect the individual character of the districts and their constituents – some commonalities can be observed. These are summarised below.

1. Supply chain interactions

Direct economic relationships between anchor cultural organisations and local creative industries firms are limited – among the anchor cultural organisations studied, we found no evidence of explicit policies to procure creative services and products from within the cultural district where they are situated. Nonetheless, there was some evidence of cultural anchors commissioning creative services from local creative firms and freelancers, especially in instances where the cultural anchor is acting as a host (providing space and other resources) to one or more creative companies or in the delivery of such services as web design, graphic design, marketing, branding and photography (although 'local' in this case often includes an area larger than the 'host' cultural district). Creative industries workers are regular visitors to local cultural organisations for professional and recreational purposes, particularly to attend artistic programmes, industry events and food and beverage outlets. Firms and professionals also reported renting space in cultural organisations to host meetings and corporate events.

2. Knowledge exchange, skills development and networking

Interactions involving the exchange of ideas, knowledge and skills are more prevalent in the districts where both cultural organisations and creative industries are strongly represented and well-established (e.g. Bristol Harbourside). Having a dedicated initiative (e.g. Creative Dundee) to facilitate networking and cooperation in the sector (along with advocacy and funding functions) proves beneficial to the creative sector and the anchor cultural organisations who gain access to a centralised and coordinated network of locally based creatives.

3. Area branding and placemaking

Universally, the representatives of creative industries firms and freelancers acknowledged the positive impact of anchor cultural organisations on the character of their local area, making it more attractive to visit and work in, with cultural organisations often serving as destinations in themselves while also creating a spillover effect through ancillary activities (e.g. contributing to the local hospitality, retail, or nightlife economy).

Through consultation undertaken in Culture Mile and five other districts, AEA identified demand for measures and initiatives on behalf of both the cultural sector (anchor organisations) and creative industries professionals. These are summarised below.

Cultural sector organisations:

- Support mechanisms, funding, and policies to encourage cross-sectoral collaboration and innovation (e.g. through R&D programmes or residencies);
- Dedicated, transparent and consistent communication mechanisms between anchor cultural organisations, formalised cultural districts, and local creative industries;
- Place-based digital networks – virtual member networks or directories to facilitate cooperation, skill-share and knowledge exchange, and general exchange of information.

Creative industries professionals:

- Provision of affordable and accessible rehearsal, studio, and workspaces for artists and creative professionals by anchor cultural organisations;
- Outreach and local engagement by anchor cultural organisations;
- Programmatic collaboration between 'anchor' cultural organisations and smaller organisations in the area, as well as the local community and creative freelancers, e.g. through commissioning work;
- Collaborative placemaking projects;
- Cultural organisations offering sufficient space and resources to enable their role as 'test beds' for new creative products and innovation;
- Accessible and engaging programming in public spaces;
- Cultural programming in the public realm (especially reflective of and celebrating the local area).

6.2 Recommended steps and policy measures

The recommendations below can be addressed by local and national policymakers, Business Improvement Districts, placemaking initiatives, formalised cultural districts, and sector support organisations to contribute positively to the collaboration and growth of co-located cultural organisations and creative industries. The different governance structures present in the districts studied, and others like them, mean the way in which they configure their organisations and stakeholders to address these recommendations will vary. Support measures for local creative industries have been highlighted by a number of white papers in response to the implications of COVID-19 on the creative sector, for example the Local Government Association paper on "Creative places. Supporting your local creative economy" (August 2020).[94] With projected job and income losses in the creative sector as a result of COVID-19, the measures to support mutual growth of local creative businesses and cultural organisations are becoming of even greater necessity.[95]

As identified by the consultees of this study and summarised by AEA, recommended measures to encourage greater collaboration and growth of co-located creative industries and cultural organisations and steps to facilitate a deeper understanding of the factors impacting cross-sectoral relationships include:

Support of mutual growth and collaboration between cultural organisations and local creative industries

- Invest in initiatives aimed at cross-sector innovation and collaboration between not-for-profit cultural organisations and creative industries firms; intentionality about such partnerships can support innovation that would not happen otherwise due to financial constraints of not-for-profit cultural sector and business models in creative industries. As mapping and consultation analysis of this study has shown, the creative industries across all studied districts are predominantly micro and small businesses with limited capacity for pro bono work or offering services below the market rate. Targeted investment from local and national funders in collaborative and R&D projects involving cultural organisations and creative businesses and freelancers can help stimulate cross-sector innovation.
- Introduce and maintain accessible online networks of creative professionals, businesses, and cultural organisations co-located within a cultural district to encourage exchange of information and new collaborations.
- Establish support coalitions to represent the interests of the collective cultural and creative sector in the local area.
- Develop a cohesive cultural and creative strategy for the area in consultation with local cultural and creative organisations and businesses and the wider community.
- Prioritise local and diverse groups, where possible, in the procurement of creative services at anchor cultural organisations.

---

[94] Local Government Association, *Creative places. Supporting your local creative economy*, August 2020; Accessed 20 August 2020.

[95] Oxford Economics, *The Projected Economic Impact of COVID-19 on the UK Creative Industries*, June 2020; https://www.oxfordeconomics.com/recent-releases/The-Projected-Economic-Impact-of-COVID-19-on-the-UK-Creative-Industries; Accessed 20 August 2020.

- Introduce programmes at anchor organisations aimed to encourage social and cultural equity and inclusivity.
- Support informal networks, especially those built around universities and large-scale local projects (e.g. festivals). As the Brighton Fuse study previously suggested, "creating interdisciplinary integration is difficult but can be done", and the Brighton creative tech cluster has maximised events like festivals to build cooperation and networks.[96]
- Develop municipal initiatives to support cultural production, clusters and research such as, for example, Cultura Viva Barcelona, a platform to build cultural partnerships with close involvement from local communities and to carry out research in the cultural sector.

Sustaining growth of local creative industries and, specifically, creative freelancers

- Provide subsidised creative workspace (desks, rehearsal spaces, artist studios, maker spaces) at anchor cultural organisations and/or formalised cultural districts and local authorities, particularly those that encourage cross-disciplinary innovation.
- Offer funding to local creatives to engage them in the cultural district, its communities, and co-located cultural organisations. For example, in autumn 2020, Culture Mile launched Imagine Fund, a programme of micro-grants of £500 available to anyone living, working or studying in Culture Mile. 10 projects have been awarded funding that would allow local residents to deliver new hyper-local creative projects benefitting local area and its community.

Advancing data collection and analysis at the intersection of cultural activity and the creative economy, and specifically place-based relationships between the cultural sector and creative industries

- Establish a coordinated and systematic data collection and analysis process (regional and nation-wide) to capture relationships between the cultural sector and creative industries. When new initiatives and projects are launched, it would be helpful to build in real-time data gathering capabilities from the outset. Key data points for collection could include:
    - Frequency and types of interactions;
    - Economic transactions and supply chains;
    - Indicators of innovation and skills development.
- Develop and revisit the methodology for place-based industry mapping to find methods to capture mobile businesses and freelancers, as well as businesses operating at addresses different from their registered office location.

[96] Sapsed, Jonathan and Paul Nightingale. The Brighton Fuse. 2013. Accessed 20 August 2020. https://ahrc.ukri.org/documents/project-reports-and-reviews/the-brighton-fuse/.

Report produced by AEA Consulting with input from Professor Geoffrey Crossick; Sian Bird, Culture Mile; Adrian Ellis, Global Cultural Districts Network; and Creative Industries PEC Project Research Lead, Hasan Bakhshi. December 2020.

Appendix 1: Mapping of Creative Industries Firms by Subsector in Culture Mile

Figure 1 Advertising and Marketing

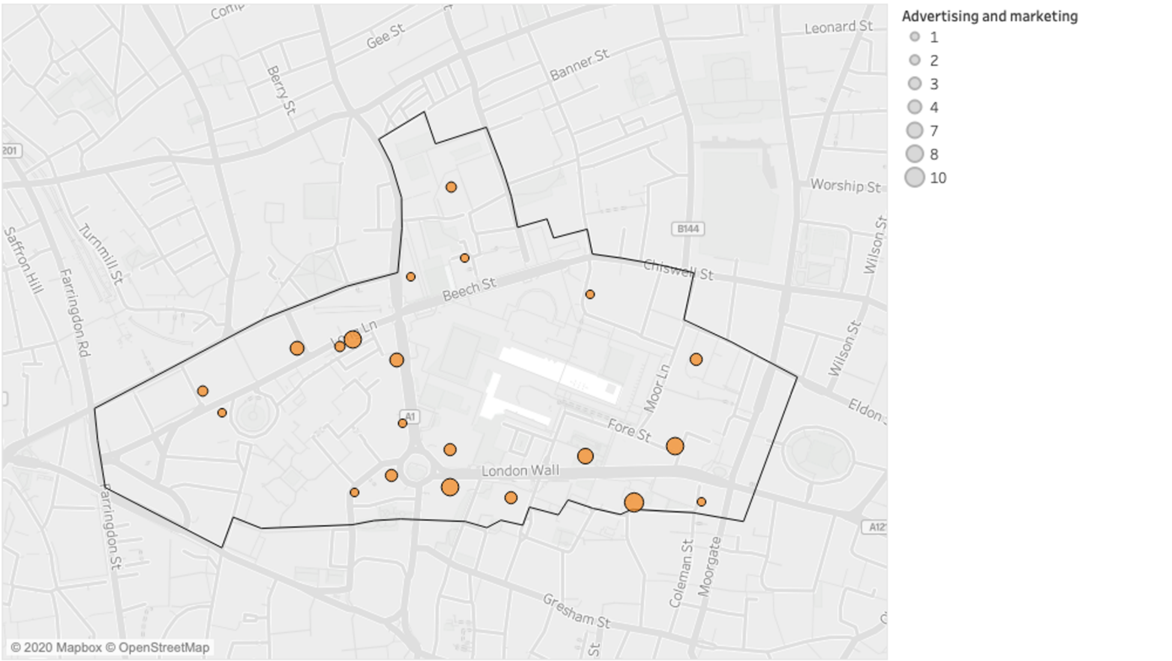


Figure 2 Film, TV, Radio and Photography

Figure 3 IT, software and computer services

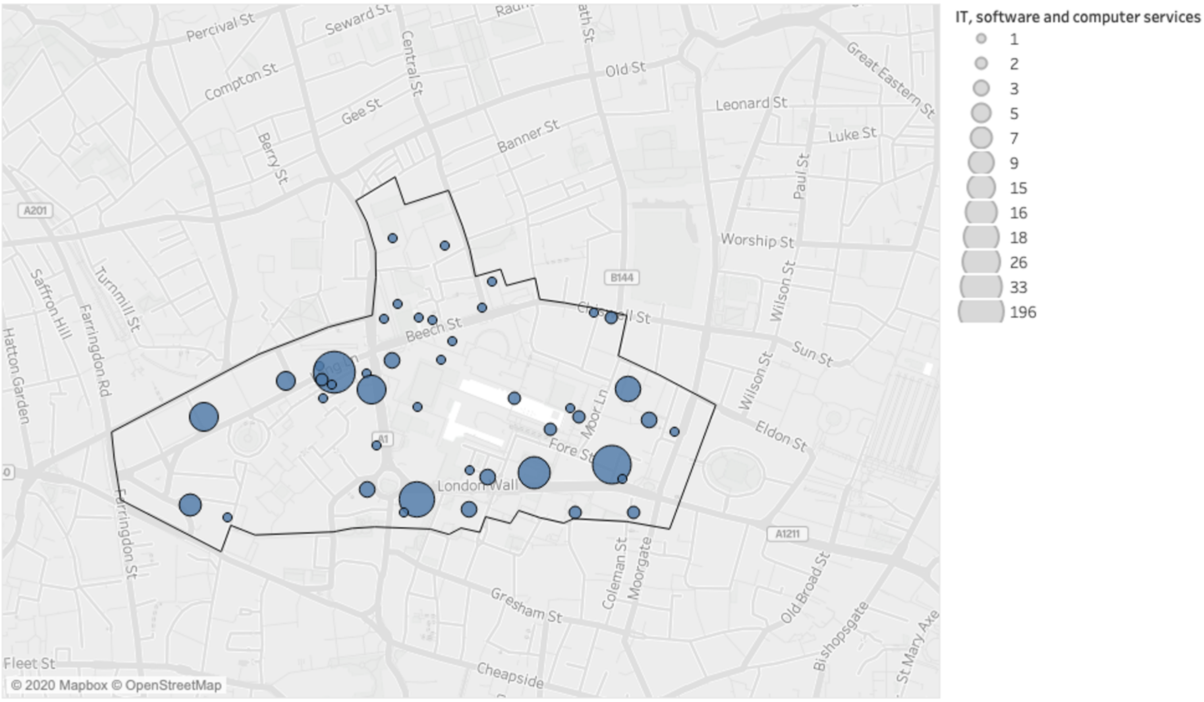


Figure 4 Architecture

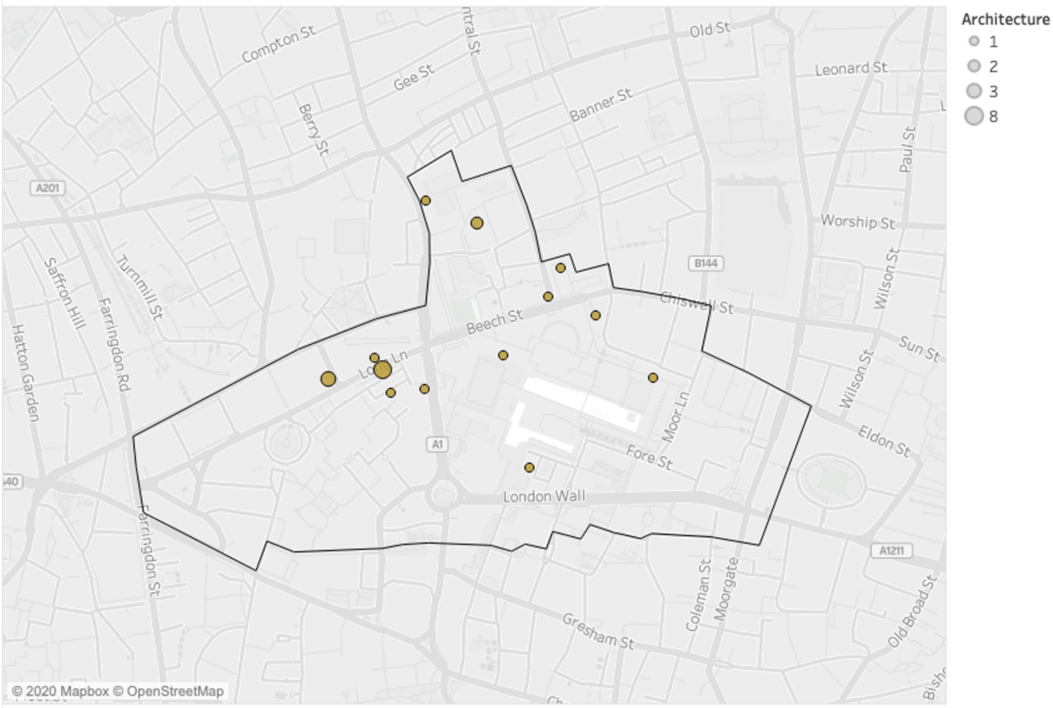


Figure 5 Publishing

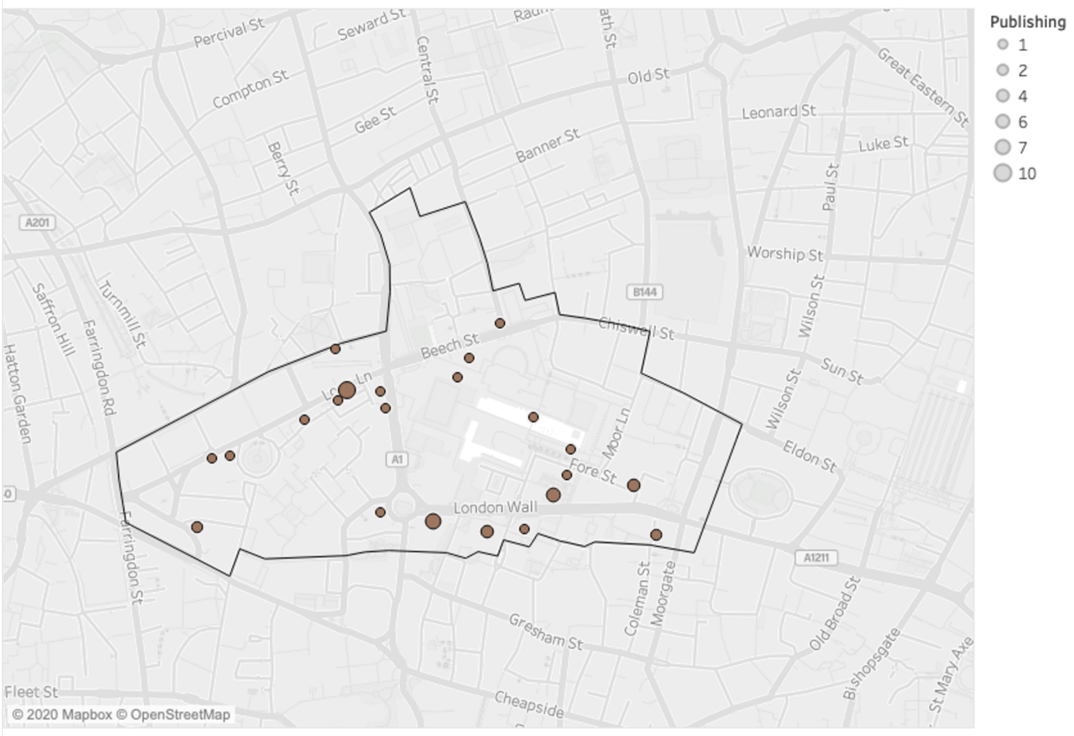


Figure 6 Music, Performing and Visual Arts

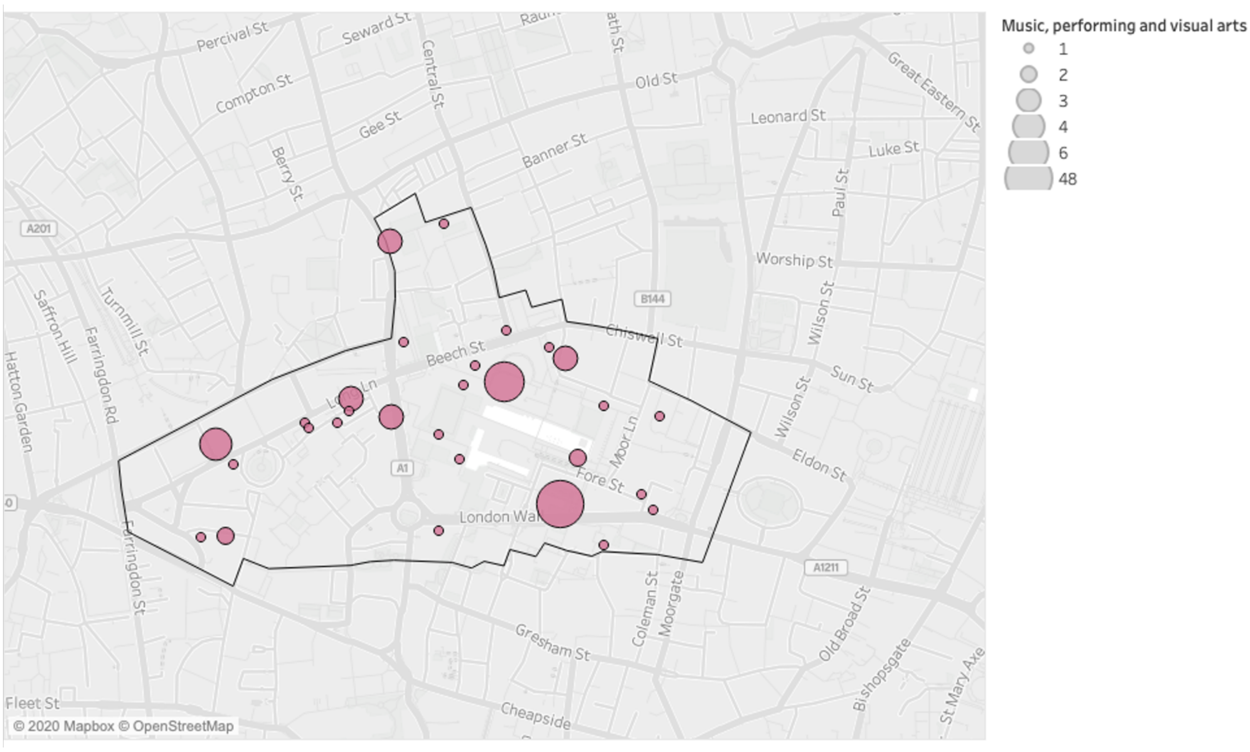
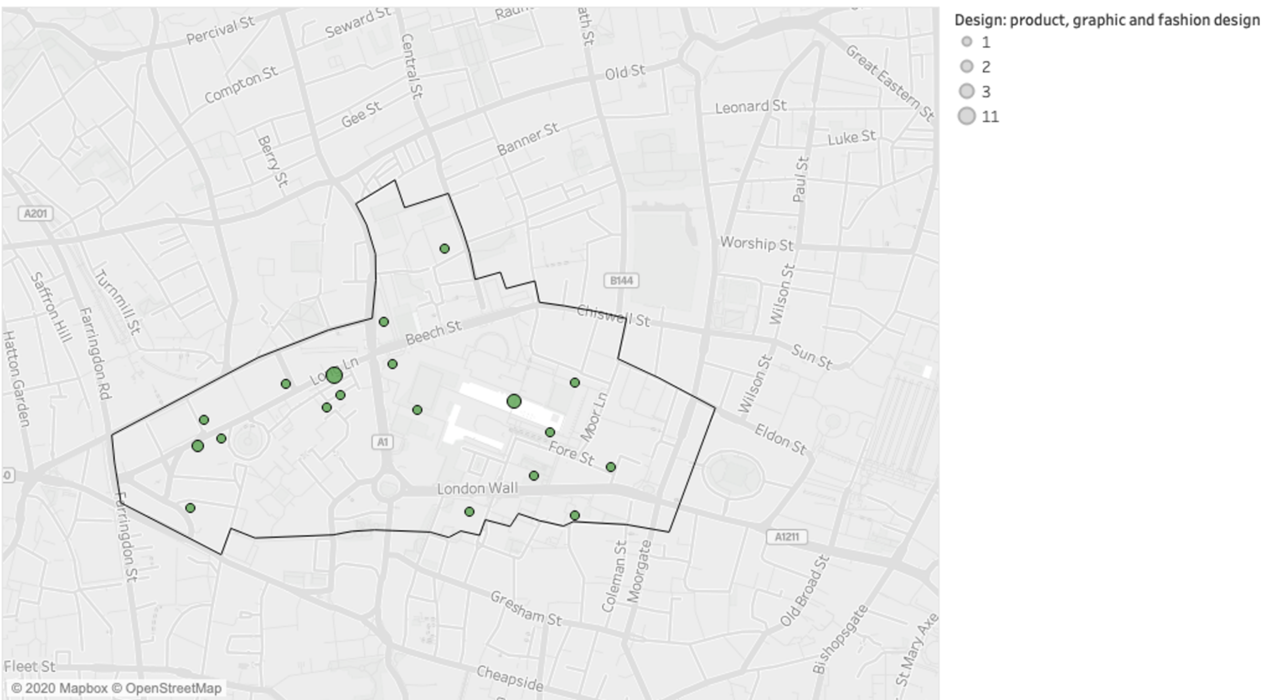


Figure 7 Museums, galleries and libraries

Figure 8 Design: product, graphic and fashion



Appendix 2: Data Sources and Bibliography

Data Sources

AEA Consulting-administered online survey of creative industries and cultural organisations in Culture Mile, April-May; July 2020.

Bilateral confidential interviews conducted by AEA Consulting with representatives of creative industries and cultural organisations in Culture Mile; Bankside (London); Dundee Waterfront; Bristol Harbourside; Salford Quays; Newcastle-Gateshead Quays; April-August 2020.

Barbican Centre and Guildhall School of Music & Drama. Financial transactions data, 2017-2019.

Culture Mile and the City of London Corporation. Boundary, Supplier and Property Strategy data, 2019. Distributed by Culture Mile and the City of London Corporation.

Companies House. *Free Company Data Product, 2019.* Distributed by UK Companies House. Accessed 26 May 2020. *http://download.companieshouse.gov.uk/en_output.html.*

Office for National Statistics. *UK Business: Activity, Size and Location – 2019.* Distributed by Office for National Statistics. Accessed 26 May 2020. *https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation.*

Department for Digital, Culture, Media and Sport. *DCMS Sectors Economic Estimates 2019: Employment.* Distributed by Department for Digital, Culture, Media and Sport. Accessed 26 May 2020. *https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2019-employment.*

Museum of London, financial transactions data, staff networking and event participation, institutional partnerships data, 2017-2019.

Non-ticketed Visitors at the Barbican, January 2019, by Futurethinking. (Provided by the Barbican Centre)

Bibliography

Albert, Alexandra, Hasan Bakhshi, Samuel Mitchell and Rachel Smithies. *Publicly-funded arts as an R&D lab for the creative industries? A survey of theatre careers in the UK.* London: Nesta/ ACE, 2013.

Anchor Institution Task Force. *Anchor organisations as partners in building successful communities and local economies: A report.* Washington, DC: U.S. Department of Housing and Urban Development, 2009.

Arthurs, Alberta, Frank Hodsoll and Steven Lavine. 'For-Profit and Not-for-Profit Arts Connections: Existing and Potential'. *The Journal of Arts Management, Law, and Society 29:2* (1999): 80-96.

Arts Council England and SDG Economic Development, *Exploring the role of arts and culture in the creative industries, June 2017*. Accessed 19 May 2020. https://www.artscouncil.org.uk/sites/default/files/download-file/Exploring%20the%20role%20of%20arts%20and%20culture%20in%20the%20creative%20industries%20%28final%29.pdf.

Arts Council England, *The Value of Arts and Culture to People and Society: An Evidence Review*. UK: ACE, 2013.

Bakhshi, Hasan and David Throsby. *Culture of innovation. An economic analysis of innovation in arts and cultural organisations.* London: Nesta, 2010.

Bakhshi, Hasan, Alan Freeman and Peter Higgs. *A Dynamic Mapping of the UK's Creative Industries.* London: Nesta, 2013.

Bakhshi, Hasan, Ian Hargreaves and Juan Mateos-Garcia. *A Manifesto for the Creative Economy*. London: Nesta, 2013,

Bakhshi, Hasan, Neil Lee and Juan Mateos-Garcia. *Nesta Working Paper No. 14/06, Capital of culture? An econometric analysis of the relationship between arts and cultural clusters, wages and the creative economy in English cities.* London: Nesta, 2014.

Bakhshi, Hasan, Philippe Schneider and Christopher Walker. 'Arts and Humanities Research in the Innovation System: The UK Example' *Cultural Science Journal 2:1*. DOI: http://doi.org/10.5334/csci.19.

Bakhshi, Hasan. *Discussion Paper 2020/01: Measuring the creative economy, A guide for policymakers.* London: Creative Industries Policy & Evidence Centre/ Nesta, 2020.

Baxter, Christie, Peter Tyler, Barry Moore, Nicky Morrison, Rob McGaffin and Mónica Otero-García. *Enterprising Places. Sustaining Competitive Locations for Technology-Based Activity.* MIT-Cambridge Institute, Programme on Regional Innovation, 2005.

BBC. *The Economic Value of the BBC: 2011/12. A Report by the BBC*. London: BBC, 2013.

Bernick, Sandra Richard Davies and Anna Valero. *Industry in Britain – An Atlas*. London School of Economics, Centre for Economic Performance, Special Paper no. 34. September 2017.

Birch, Eugénie L., Cara Griffin, Amanda Johnson and Jonathon Stover. *Arts and Culture Anchor Organisations as Urban Anchors, Livingston Case Studies in Urban Development.* Philadelphia, PA: Penn Institute for Urban Research, 2014.

Bontje, Marco and Sako Musterd. 'Creative Industries, Creative Class and Competitiveness: Expert Opinions Critically Appraised'. *Geoforum 40:5* (September 2009): 843-852.

Bögenhold, Dieter and Andrea Klinglmair. 'Independent work, modern organisations and entrepreneurial labour: Diversity and hybridity of freelancers and self-employment'. *Journal of Management & Organisation* 22(6): 843-858.

BOP Consulting and Publica. *Creative Enterprise and Innovation Research – Culture Mile*. 2018.

Breschi, Stefano and Francesco Lissoni. *Mobility and Social Networks: Localised Knowledge Spillovers Revisited.* Milan, Italy: CESPRI, March 2003.

Cauldwell-French, Evy and Annie Lydford. *Public Investment, Public Gain. How public investment in arts contributes to growth in the creative industries.* London: Creative Industries Federation, 2019.

Centre for Economics Business Research. *The contribution of the arts and culture to the national economy.* London: CEBR, 2013.

Centre for Local Economic Strategies. *Community business and anchor organisations. February 2019.* Accessed 24 August 2020. https://cles.org.uk/wp-content/uploads/2019/02/Community-business-and-anchor-organisations-Digital.pdf

Chapain, Caroline, Phil Cooke, Lisa De Propris, Stewart MacNeill and Juan Mateos-Garcia. *Creative clusters and innovation. Putting creativity on the map.* London: Nesta, 2010.

Chapple, Karen, Shannon Jackson and Anne J. Martin. 'Concentration Creativity: The Planning of Formal and Informal Arts Districts'. *City, Culture and Society 1:4* (December 2010): 225-234.

Chung, Charlotte, Luise Yang and Evy Cauldwell-French. *Growing the UK's Creative Industries: What creative enterprises need to thrive and grow.* London: Creative Industries Federation, 2018.

Comunian, Roberta. 'Rethinking the creative city: the role of complexity, networks and interactions in the urban creative economy,' *Urban Studies 48* (2011): 1157-1179.

Comunian, Roberta and Oliver Mould. 'The weakest link: Creative industries, flagship cultural projects and regeneration,' *City, Culture and Society* 5 (2014): 65-74.

Creative Industries Council, *Create Together: A Creative Industries Council Strategy for Cross Industry Collaboration, The Next 5 Years.* UK: Creative Industries Council, 2016.

Cropper, Steve, Ebers, Mark, Huxham, Chris, and Smith Ring, Peter. 'Introducing Inter-organizational Relations.' *The Oxford Handbook of Inter-Organizational Relations*, June 2008.

Crossick, Geoffrey. *Knowledge Transfer without Widgets. The Challenge of the Creative Economy. Lecture to the Royal Society of Arts 2005.* London: Goldsmiths, 2006. Accessed 2 September 2020. https://theplayethic.typepad.com/files/crossick_knowledge-transfer-without-widgets.pdf

Crossick, Geoffrey and Patrycja Kaszynska. *Understanding the value of arts & culture, The AHRC Cultural Value Project.* Swindon: Arts & Humanities Research Council, 2016.

Currid, Elizabeth. *The Warhol Economy: How Fashion, Art, and Music Drive New York City.* Princeton, New Jersey: Princeton University Press, 2007.

Department for Business, Energy & Industrial Strategy, *Knowledge Quarter Science and Innovation Audit.* June 2018.

Department for Digital, Culture, Media and Sport. *Culture at the heart of regeneration.* London: DCMS, 2004.

Dovey, Jon, Andy C Pratt, Simon Moreton, Tarek Virani, Janet Merkel and Jo Lansdowne. *The Creative Hubs Report: 2016.* UK: British Council, 2016.

Easton, Eliza and Evy Cauldwell-French. *Creative Freelancers*. London: Creative Industries Federation, 2017.

Ellis, Adrian and Sonali Mishra. 'Managing the Creative – Engaging New Audiences: A dialogue between for-profit and not-for-profit leaders in the arts and creative sectors'. Los Angeles, CA: The Getty Leadership Institute, 2004. Accessed 19 May 2020. *https://www.artstrategies.org/downloads/ManagingTheCreativeBackground.pdf.*

Ernst & Young. *Creating growth: Measuring cultural and creative markets in the EU.* Paris: Ernst & Young Global Limited, 2014

ERS Research & Consultancy. *NGCV, Economic Impact Assessment 2015-2016.* Accessed 24 August

2020. http://www.case4culture.org.uk/wp-content/uploads/2017/01/NGCV-Economic-Impact-Assessment-Report-2015-16-ERS-18-Nov-2016.pdf

Eskogen Reference Economic Consultants. *V&A Dundee Economic Impact Assessment. Year 1 impacts for V&A Dundee. Final Report January 202.* Accessed 23 August 2020. https://www.vam.ac.uk/dundee/info/policies

Evans, Graeme. 'Rethinking Place Branding and Place Making Through Creative and Cultural Quarters,' in *Rethinking Place Branding. Comprehensive Brand Development for Cities and Regions.* Edited by Mihalis Kavaratzis, Gary Warnaby and Gregory J. Ashworth. Cham: Springer, 2015.

Evans, Graeme. 'Creative cities, creative spaces and urban policy.' *Urban Studies* Volume 46 No. 5-6: 1003-1040.

Falck, Oliver, Michael Fritsch and Stephan Heblich. 'The phantom of the opera: cultural amenities, human capital and regional economic growth, *Labour Economics 18* (2011): 755-766.

Fleming, Tom and Andrew Erskine. *Supporting growth in the arts economy.* UK: Arts Council England, 2011.

Florida, Richard. *The Rise of the Creative Class: and how it's transforming work, leisure, community and everyday life.* New York, NY: Basic Books, 2002.

Foord, Jo. 'The new boomtown? Creative city to Tech City in east London'. *Cities 33* (August 2013): 51-60.

Francesconi, Alberto. *Advanced Cultural Districts: Innovative Approaches to Organisational Design.* Basingstoke: Palgrave Macmillan, 2015.

Frey, Bruno S. Superstar museums: An economic analysis,' *Journal of Cultural Economics* 22 (1998): 113-25.

Frontier Economics. *Creative Industry Spillovers: understanding their impact on the wider economy.* London: Frontier Economics, 2007.

Fujiwara, Danie, Hasan Bakhshi, Ricky Lawton, Susana Mourato and Paul Dolan. *Measuring Economic Value in Cultural Organisations. A report commissioned by the Arts and Humanities Research Council's Cultural Value Project.* Swindon: AHRC, 2015.

Garcia, Beatriz, Ruth Melville and Tamsin Cox. *Creating an impact: Liverpool's experience as European Capital of Culture.* Liverpool: University of Liverpool, 2010.

Grodach, Carl, Nicole Foster and James Murdoch III. *Gentrification and the artistic dividend: the role of the arts in neighbourhood change.* Washington, DC: National Endowment for the Arts, 2014.

Grodach, Carl. 'Looking Beyond Image and Tourism: The Role of Flagship Cultural Projects in Local Arts Development,' *Planning Practice & Research 23:4* (2008): 495-516.

Hanna, Kat. *Spaces to think: Innovation Districts and the changing geography of London's knowledge economy.* London: Centre for London, April 2016.

HM Government. Industrial Strategy: Creative Industries Sector Deal. UK: HM Government, 2018. Accessed 19 May 2020. *https://www.gov.uk/government/publications/creative-industries-sector-deal*.

Holden, John. *Publicly-funded culture and the creative industries*. London: ACE, 2007.

Holden, John. *The Ecology of Culture: a Report Commissioned by the Arts and Humanities Research Council Cultural Value Project*. Wiltshire: AHRC, 2015.

House of Commons, Culture, Media and Sport Committee. *Supporting the creative economy. Third Report of Session 2013-2014 Volume II: Additional written evidence.* London: The Stationery Office Limited, 2013, Ev w 62.

Jacobs, Jane. *Cities and the wealth of nations: Principles of economic life.* New York, NY: Random House, 1984.

Jones, Alexandra. 'City arts strategies in a cold climate' in *Towards Plan A: A New political economy for* *arts and culture.* UK: RSA, 2013, 49-62.

Katz, Bruce and Julie Wagner. *The Rise of Innovation Districts: A New Geography of Innovation in America.* Washington, DC: Brookings, May 2014.

Knudsen, Brian, Richard Florida, Kevin Stolarick and Gary Gates. 'Density and creativity in US regions,' *Annals of the Association of American Geographers 98:2* (2008): 461-478.

Landry, Charles and Franco Bianchini. *The Creative City: A Toolkit for Urban Innovators.* London: Demos, 1995.

Landry, Charles. *The Art of City-making.* London: Earthscan, 2006.

Lee-Saxenian, Anna. *Regional Advantage: Culture and Competition in Silicon Valley and Route 128.* Boston, MA: MIT Press, 1996.

Markusen, Anna and Greg Schrock. 'The Artistic Dividend: Urban Artistic Specialisation and Economic Development Implications.' *Urban Studies* Volume 43 No. 10 (2006): 1661-1686.

Mateos-Garcia, Juan and Hasan Bakhshi. *The Geography of Creativity in the UK*. London: Nesta, 2016.

Mateos-Garcia, Juan and Jonathan Sapsed. *The role of universities in enhancing creative clustering*. Brighton: University of Brighton, 2011.

Mateos-Garcia, Juan, Joel Klinger and Konstantinos Stathoulopoulos. *Creative Nation. How the creative industries are powering the UK's nations and regions.* London: Nesta, 2018.

McCarthy, John. 'Promoting Image and Identity in 'Cultural Quarters': The Case of Dundee, *Local Economy* Volume 20 No. 3 (August 2005): 280-293.

Miles, Steven and Ronan Paddison. 'Introduction: The Rise and Rise of Culture-led Urban Regeneration'. *Urban Studies Vol. 42, Nos 5/6* (May 2005): 833-839.

Montgomery, John. 'Cultural Quarters as Mechanisms for Urban Regeneration. Part 1: Conceptualising Culture Quarters,' *Planning, Practice & Research* Volume 18 No. 4 (November 2003): 293-306.

Mould, Oliver. *Urban Subversion and the Creative City.* London: Routledge, 2015.

Mould, Oliver and Roberta Comunian. 'Hung, Drawn and Cultural Quartered: Rethinking Cultural Quarter Development Policy in the UK,' *European Planning Studies* Volume 23 No. 12 (2015): 2356-2369.

Mould, Oliver, Tim Vorley and Kai Lu, 'Invisible Creativity? Highlighting the Hidden Impact of Freelancing in London's Creative Industries,' *European Planning Studies* 22:12 (2014): 2436-2455.

Müller, Kathrin, Christian Rammer and Johannes Trüby. *The Role of Creative Industries in Industrial Innovation. ZEW Discussion Paper 08-109.* Retrieved from *www.tandfonline.com/doi/abs/10.5172/impp.11.2.148*

Nathan, Max. *Centre for Economic Performance Discussion Paper No 1648, Does Light Touch Cluster Policy Work? Evaluating the Tech City Programme.* London: London School of Economics, August 2019.

Nathan, Max, Emma Vandore and Georgina Voss. 'Spatial Imaginaries and Tech Cities: Place-branding East London's digital economy'. *Journal of Economic Geography 19:2* (2018): 409-432.

Nijssen, Edwin J, Bas Hillebrand, Patrick A.M. Vermeulen and Ron G. M. Kemp. 'Exploring product and service innovation similarities and differences.' *International Journal of Research in Marketing* 23:3, 241-251.

O'Connor, Justin. *The cultural and creative industries: A review of the literature* 2nd edition. London: Arts Council England, 2007.

Oehler, Kay, Stephen C. Sheppard, Blair Benjamin and Laurence K. Dworkin. *Network Analysis and the Social Impact of Cultural Arts Organisations.* Williamstown, MA: Centre for Creative Community Development, 2007.

Plaza, Beatriz and Silke Haarich. 'Museums for urban regeneration? Exploring conditions for their effectiveness,' *Journal of Urban Regeneration & Renewal* 2:3 (Spring 2009), 259-271.

Plaza, Beatriz Manuel Tironi and Silke N. Haarich. 'Bilbao's Art Scene and the "Guggenheim effect" Revisited'. *European Planning Studies* 17:11 (2009):1711-1729.

Porter, Michael. *The Competitive Advantage of Nations.* New York, NY: The Free Press, 1990.

Pratt, Andy. 'Advertising and creativity, a governance approach: A case study of creative agencies in London' *Environment and Planning 38:10*, 2006: 1883-1899.

Ramsden, Hilary, Angus McCabe and Jenny Phillimore. *Connected Communities. The role of grassroots arts activities in communities: a scoping study.* Birmingham: Third Sector Research Centre, 2011.

Reed, Sara, Anya Göpfert, Suzanne Wood, Dominique Allwood and Will Warburton, *Building healthier communities: the role of the NHS as an anchor institution.* August 2019. Accessed 24 August 2020. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/414390/Anchor_organisations_and_small_firms.pdf.

Ritter, Thomas, Gemünden, Hans Georg. 'Interorganizational relationships and networks: An overview.' *Journal of Business Research 56,* 2003: 691-697.

Rocks, Christopher. *Working Paper 89, London's creative industries – 2017 update.* London: GLA Economics, 2017.

Roger Tym & Partners. *Economic Impact of the Liverpool Arts Regeneration Consortium*. Manchester: Roger Tym & Partners, 2011.

Roodhouse, Simon. *Cultural Quarters: Principles and Practice.* Bristol: Intellect Books, 2006.

Salvesen, David and Henry Renski. *The Importance of Quality of Life in the Location Decisions of New Economy Firms.* Chapel Hill, NC: Centre for Urban and Regional Studies, 2003.

Santagata, Walter. 'Cultural district, property rights and sustainable economic growth,' *International Journal of Urban and Regional Research, 26:1*(2002): 9-23.

Sapsed, Jonathan and Paul Nightingale. The Brighton Fuse. 2013. Accessed 19 May 2020. https://ahrc.ukri.org/documents/project-reports-and-reviews/the-brighton-fuse/.

Sapsed, Jonathan, Roberto Camerani, Monica Masucci, Mylene Petermann and Megha Rajguru. *Brighton Fuse 2: Freelancers in the Creative Digital IT Economy*. Swindon: AHRC, 2015.

Spinuzzi, Clay. 'Working alone together: Co-working as emergent collaborative activity'. *Journal of Business and Technical Communication* 26(4): 399-441.

Schneekloth, Lynda H. and Robert G. Shibley. *Placemaking: The Art and Practice of Building Communities.* New York, NY: Wiley, 1995.

Smith, Chris. *Creative Britain.* London: Faber and Faber, 2000.

Spinuzzi, Clay. 'Working alone together: Co-working as emergent collaborative activity'. *Journal of Business and Technical Communication* 26(4): 399-441.

Stern, Mark J. and Susan C Seifert, *Cultivating "Natural" Cultural Districts.* Philadelphia, PA: Reinvestment Fund, 2007.

Stern, Mark J. and Susan C. Seifert. 'Cultural Clusters: The Implications of Cultural Assets Agglomeration for Neighbourhood Revitalisation'. *Journal of Planning Education & Research 29:3* (2010): 262-279.

Stern, Mark J. and Susan C. Seifert. 'Culture and Urban Revitalisation: A Harvest Document'. *Culture and Community Revitalisation: A Collaboration* (2007).

Stern, Mark J. and Susan C. Seifert. *"Natural" cultural districts: Arts agglomeration in metropolitan Philadelphia and implications for cultural district planning.* Philadelphia, PA: University of Pennsylvania, 2005.

Sterngold, Arthur H. 'Do Economic Impact Studies Misrepresent the Benefits of Arts and Cultural Organisations?,' *The Journal of Arts Management, Law, and Society,* 34:3 (2004): 166-187.

Storper, Michael and Anthony J Venables. 'Buzz: face-to-face contact and the urban economy'. *Journal of*

Economic Geography 4:4 (August 2004): 351-370.

Tether, Bruce S. *Discussion Paper 2019/01, Mind the Gap, Regional Inequalities in the UK's Creative Industries.* London: PEC, 2019.

Throsby, David. 'The concentric circles model of the cultural industries,' *Cultural Trends 17:3* (2008): 188-204.

UK Commission for Employment and Skills. *Anchor organisations and small firms in the UK: A review of the literature,* March 2015. Accessed 24 August 2020. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/414390/Anchor_organisations_and_small_firms.pdf

V&A Dundee. *V&A Dundee. National Lottery Heritage Fund. Final Evaluation Report, August 2019.* Accessed 23 August 2020. https://www.vam.ac.uk/dundee/info/policies.

Warwick Commission. *Enriching Britain: culture, creativity and growth. The 2015 report by the Warwick Commission on the future of public value*. Coventry: University of Warwick, 2015.

Westbrook, Steve. *Economic Impact Evaluation of Dundee Contemporary Arts. Final Report.* Accessed 2 September 2020, *http://www.evaluationsonline.org.uk/evaluations/Browse.do?ui=browse&action=show&id=165&taxonomy=BCS*

Wickham, Melisa. 'Self-employment in London' *GLA Economics Working Paper 56* (2013). https://www.london.gov.uk/sites/default/files/gla_migrate_files_destination/SE%20in%20London.pdf.

Zeult, Kim, Zachary Nieder, Kathleen O'Shea, Stephanie Savir and Jay Gray. *The Overlooked Anchors. Advancing a New Standard of Practice for Arts and Culture Organisations to Create Equitable Opportunity in America's Cities.* Roxbury, MA: ICIC, 2019.