

Digital Creative Industries Consultation

Friday 7 February
8 – 11.30am

FALMOUTH
UNIVERSITY

Digital Creative Industries Consultation Agenda

- 08.00 Participants arrive, breakfast served
- 08.30 Introduction from Professor Anne Carlisle
LEP Board Member & Vice-Chancellor, Falmouth University
- 09:00 Councillor Tim Dwelly,
Chair of the Economic and Culture Advisory Board,
Cornwall Council
- 09.10 Open space workshop
- 11.00 Keynote Listener summary – Anne Carlisle
- 11.10 Next Steps – Phil Moore
Pro Vice-Chancellor, Member of Innovation,
Research and Knowledge Working Group
- 11.15 Networking

Smart Specialisation & The Creative Industries

Professor Anne Carlisle
Vice-Chancellor & Chief Executive

FALMOUTH
UNIVERSITY

THE CREATIVE INDUSTRIES

"The creative industries are a British success story. They continue to grow, and the government sees the real potential they have to help our economy in the coming years."

*Ed Vaizey, Minister for Culture,
Communications and the Creative Industries*

CREATIVITY IN INDUSTRY

“Creativity isn’t just about connecting things. When you ask creative people how they did it, they feel sort of guilty because they say they didn’t really do it – they just somehow saw it. I’m telling you even if they don’t yet know it every company needs creative eyes.”

Steve Jobs - former CEO of Apple Inc

WHAT ARE THE CREATIVE INDUSTRIES?

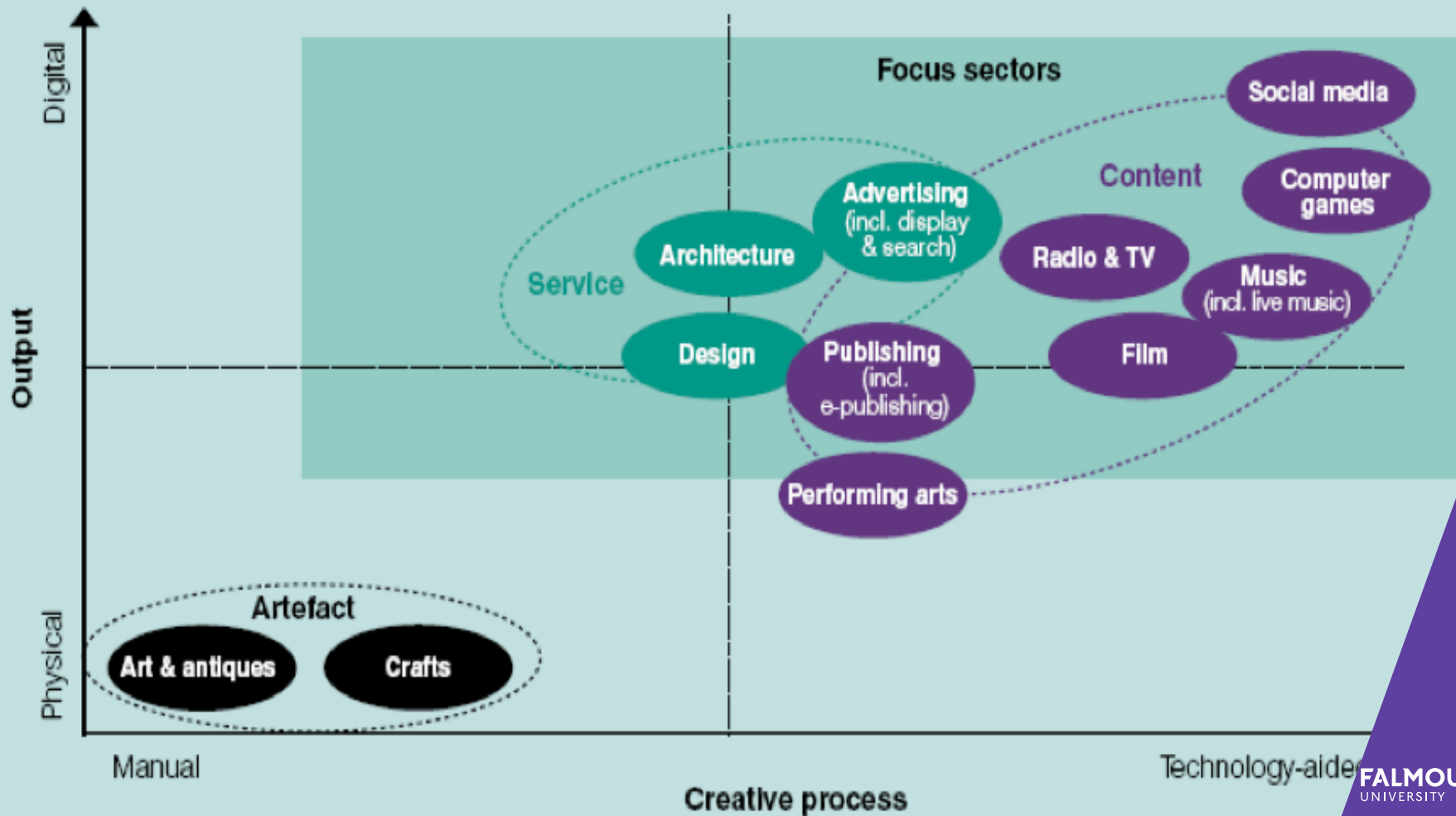


‘Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.’

(UK Government 2001 Creative Industries Mapping Document)

CREATIVE INDUSTRIES INCLUDE:

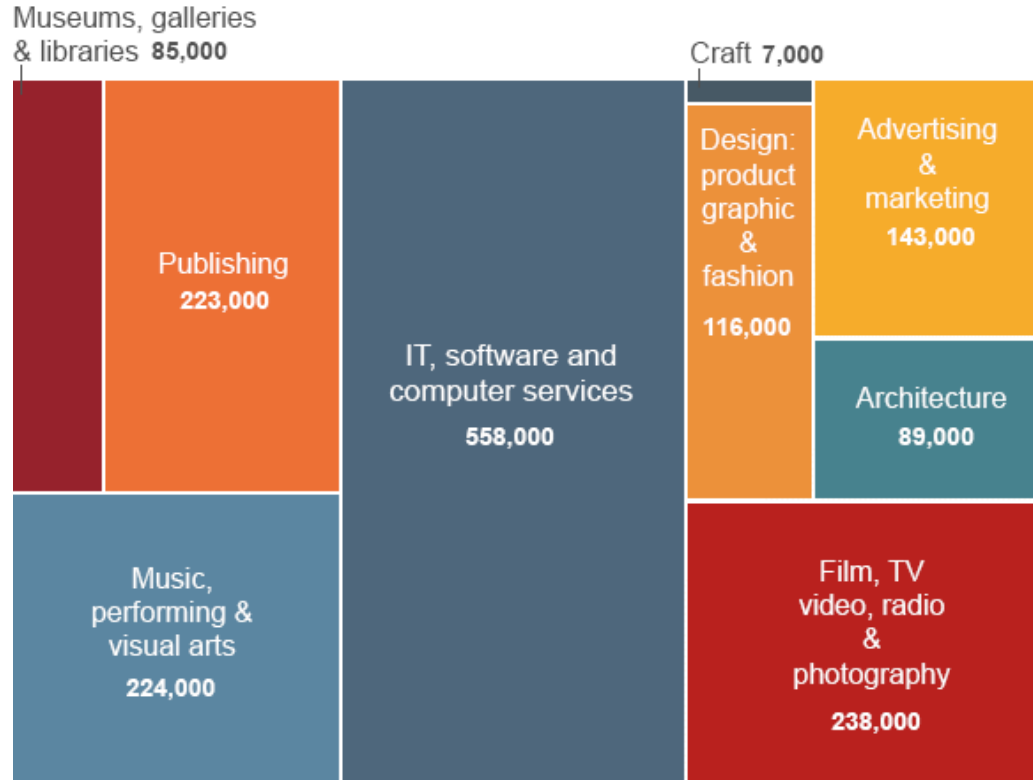
- Advertising
- Architecture
- Art and antiques
- Crafts
- Design
- Designer fashion
- Film and video
- Interactive leisure software
- Music
- The performing arts
- Publishing
- Software and computer services
- Television and radio



EMPLOYMENT

- The Creative Economy accounted for 1.68 million jobs in 2012, or 1 out of every 18 jobs in the UK
- IT, software and computer services was the largest Creative Economy group, with employment of 791,000 in 2012 (31% of employment in the Creative Economy)
- Employment in the Creative Industries increased by 8.6 per cent between 2011 and 2012, a higher rate than for the UK Economy as a whole (0.7%)
- There have been no significant decreases in employment between 2011 and 2012 for any Creative Economy group

EMPLOYMENT IN THE CREATIVE INDUSTRIES



Source: DCMS

TOTAL: 1,684,00

ONE IN EVERY 18 JOBS

Creative Industries Group (Employment)	2011	2012	% Change
Advertising & Marketing	147,000	143,000	-2.8%
Architecture	93,000	89,000	-4.2%
Crafts	9,000	7,000	-19.5%
Design: Product, Graphic & Fashion Design	100,000	116,000	16.2%
Film, TV, Video, Radio & Photography	209,000	238,000	13.6%
IT, Software & Computer Services	482,000	558,000	15.6%
Publishing	207,000	223,000	7.5%
Museums, Galleries & Libraries	90,000	85,000	-5.4%
Music, Performing & Visual Arts	212,000	224,000	5.6%
Creative Industries Total	1,551,000	1,684,000	8.6%
UK Total Employment	29,935,000	30,150,000	0.7%
Percentage Share of UK Total	5.2%	5.6%	-

GVA (2008-2012)

- Gross Value Added (GVA) is measured in current prices (i.e. they do not account for inflation)
- GVA of the Creative Industries was £71.4 billion in 2012 and accounted for 5.2 per cent of the UK Economy
- GVA of the Creative Industries has increased by 15.6 per cent since 2008, compared with an increase of 5.4 per cent for the UK Economy as a whole
- GVA of the Creative Industries increased by 9.4 per cent between 2011 and 2012, higher than for any Blue Book industry sector in the National Accounts

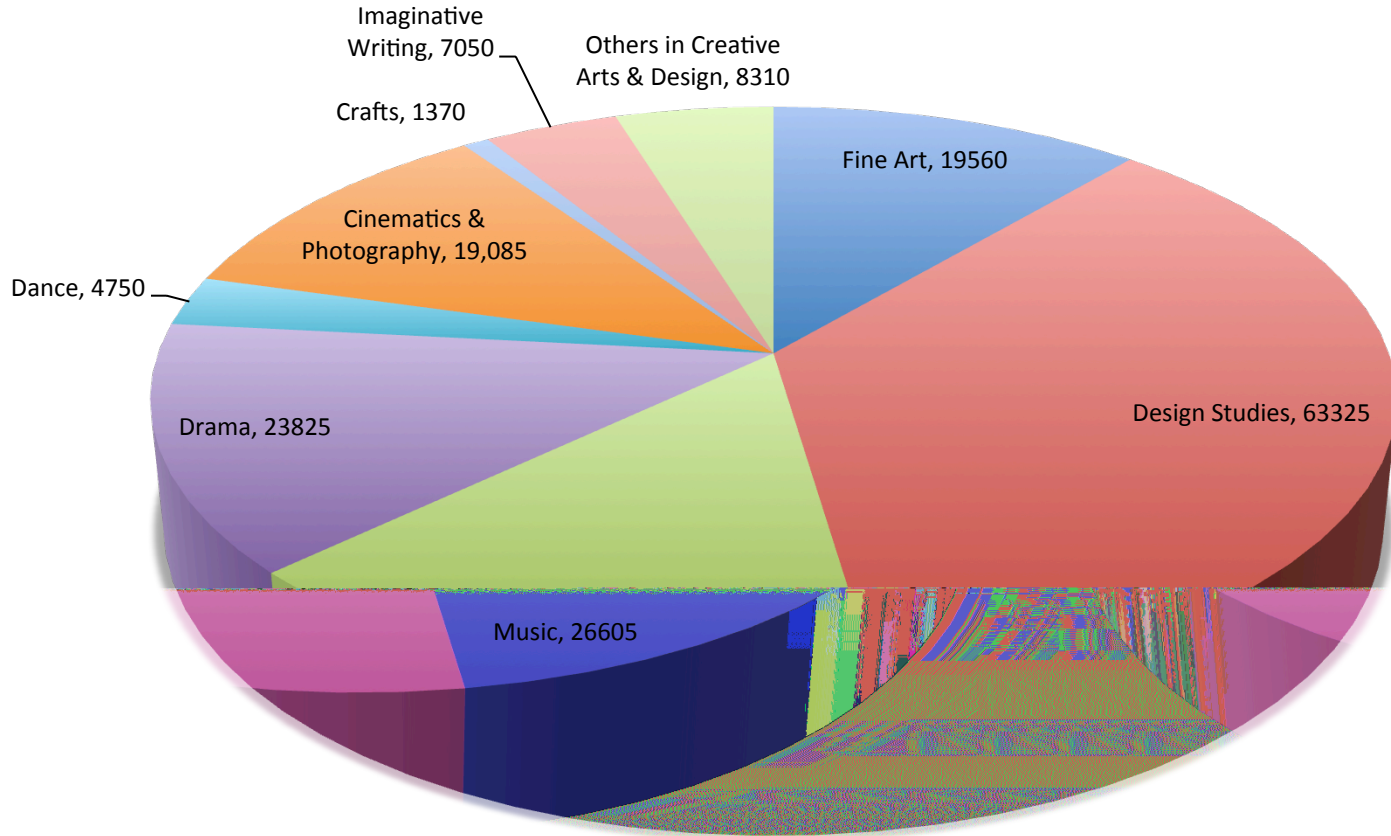
EXPORTS OF SERVICE

- Exports of Services are measured in current prices (i.e. they do not account for inflation)
- The value of services exported by the Creative Industries was £15.5 billion in 2011, 8.0 per cent of total UK service exports
- Between 2009 and 2011 the value of service exports from the Creative Industries increased by 16.1 per cent. This compares with an increase of 11.5 per cent for total UK service exports

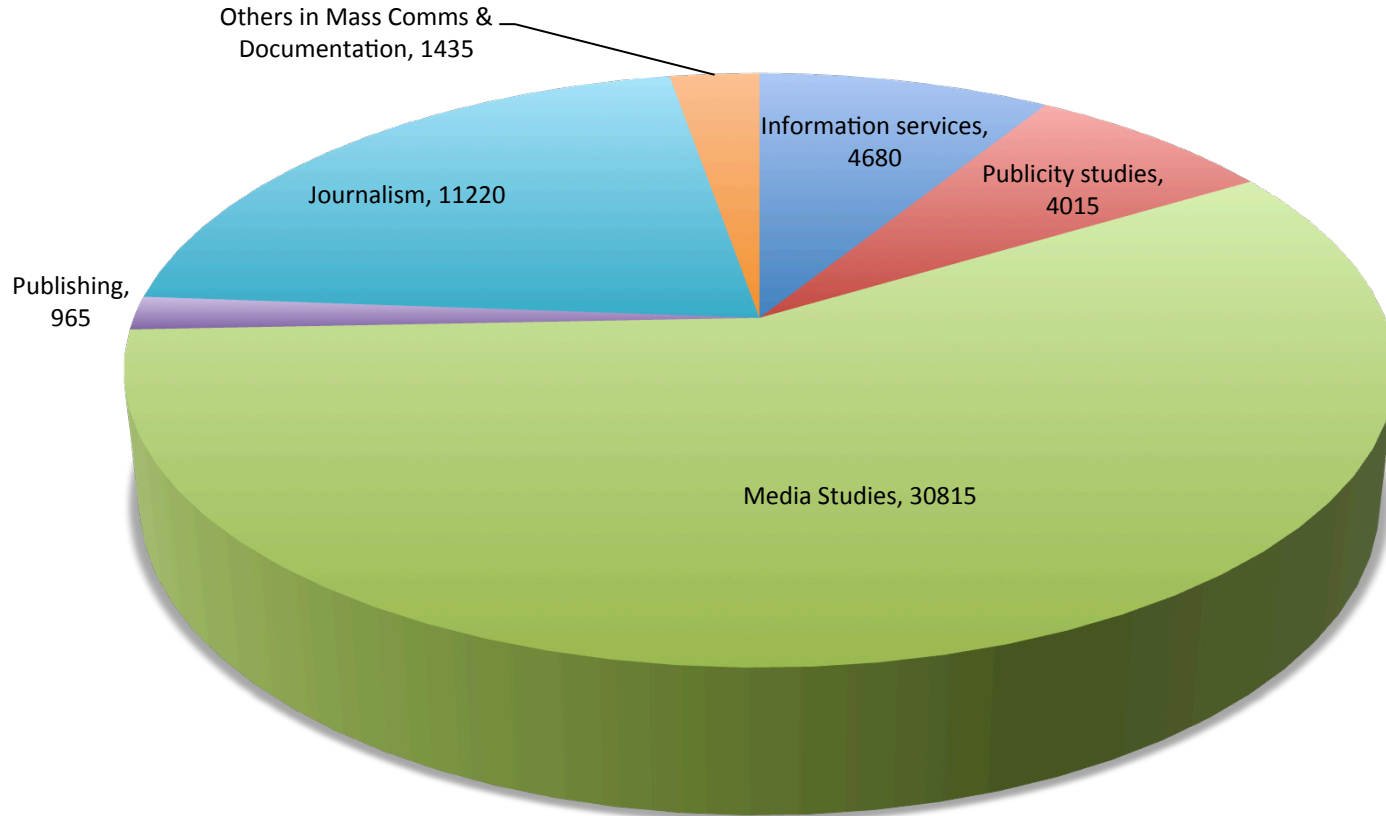
GROWTH OF KNOWLEDGE BASED INDUSTRIES

- UK supply chain - @225,000 students studying creative degrees
- This is second only to United States of America
- The knowledge economy is dependent on high level skills

STUDENT NUMBERS



STUDENT NUMBERS

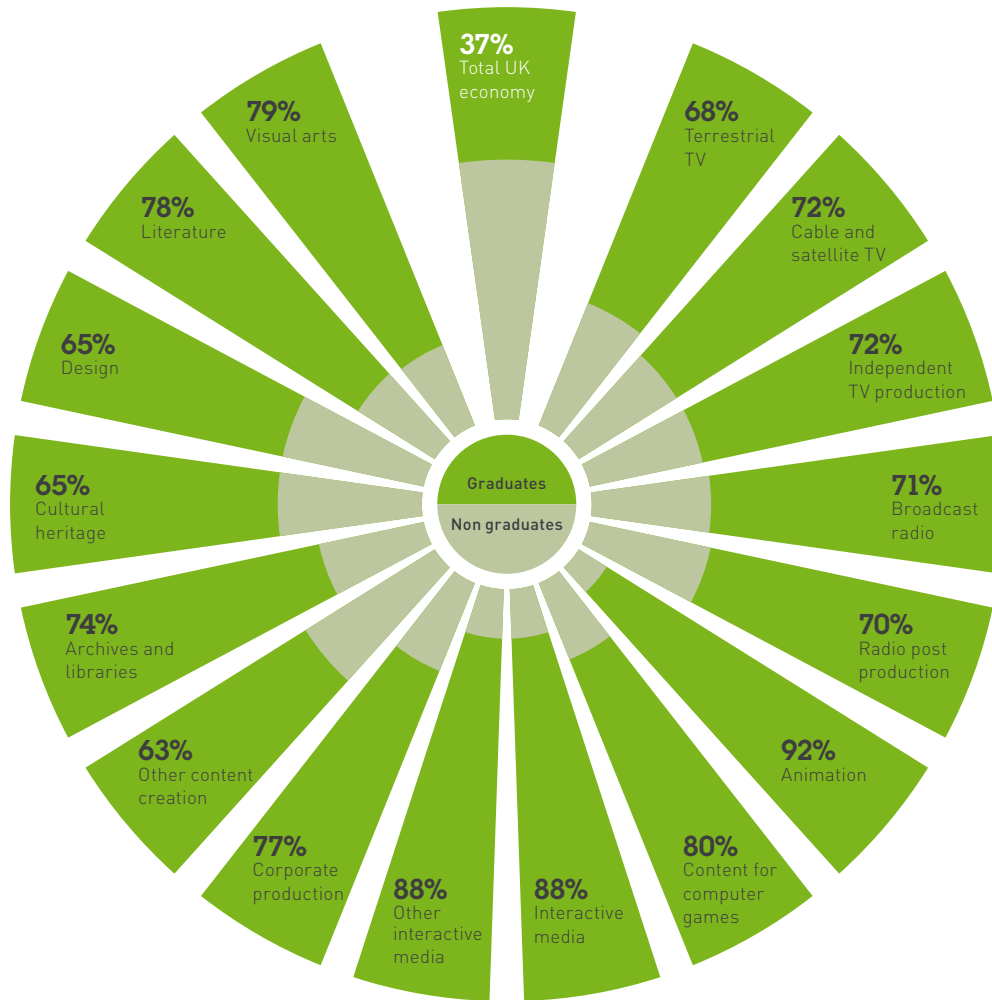


THE ROLE OF THE CREATIVE DEGREE

- 37% of employed people in the UK are graduates,

but...

- 70% – 90% of creative sector jobs are filled by a graduate
- The creative sector is dependent on graduate skills



CREATIVE CORNWALL



St IVES

TATE

DISTINCTIVE FEATURES

- Cornwall has the second largest creative industries hub in the UK
- Creative exports from the South West have contributed £10bn to the UK economy
- Cornwall is home to some of the UK's most creative companies

CREATIVE CORNISH BUSINESSES



finisterre



StreamTV

COMPETITIVE ADVANTAGE

- In the EU Cornwall is defined as an outermost region, yet in an important globally growing economic sector it has the critical mass normally only associated with larger urban centres.
- Self-employment in Cornwall is at 15.2%, higher than the national average at 9.1%.
- Falmouth's creative graduates are 5 times more likely to set up their own business than the graduate average

EU SIF – STRATEGIC PRIORITIES FOR THE LEP

Marine Technology	Offshore renewables(wave and wind) Advanced marine paint technologies Green ship technologies	Offshore wind energy Advanced materials and nano-technology Energy and its storage
Agri-tech	Animal health and welfare in dairy cattle Resource efficiency in the production process Plant health	Agri-science Agri-technology Big data Robotics and autonomous systems
E-health	E-wellbeing – using digital technologies to improve health outcomes End to end skills programmes	Information economy Big data Education (supporting)
Digital Economy	Digital media / gaming Software development Pervasive media (content application services)	Information economy Big data Information economy
Space and Aerospace Assets	Goonhilly – satellite management and applications	Aerospace Space

DIGITAL ECONOMY KNOWLEDGE ASSETS



DIGITAL ECONOMY PHYSICAL ASSETS

FALMOUTH / EXETER / PLYMOUTH



DIGITAL ECONOMY ENTERPRISE ASSETS

- Rapid growth in the digital sector – between 2009 and 2014 employment has increased by 26%, with turnover increasing by 24%
- Over 1000 small and micro businesses in the digital sector
- Cluster of world leading software and digital science businesses – these include Headforwards, Avanti, Altcom, Sullivan Cuff and Geoscience
- Cluster of globally competitive digital creative businesses – these include Tigerx, ikandi, Spider Eye

OUR STUDENTS WORK WITH:



OUR CREATIVE JOURNEY

- Foundation
- Undergraduate
- Taught Master's
- Research degrees
- Pre-incubation in AIR
- Incubation of start-ups and spin out businesses
- Grow on space and facilities

ACADEMY FOR INNOVATION AND RESEARCH



CREATIVITY IN INDUSTRY

- Business Assists
- Portals and networks
- R&D
- Concept Design
- Sandpits and think-tanks
- Rapid pro-typing
- Proof of concept
- Product and Service development

CREATIVE INDUSTRIES

VALUE TO THE REGION

- Thriving global industry
- High growth high value jobs
- Stimulates self-employment and business start ups
- Good supply of highly creative and entrepreneurial graduates able to work across multiple sectors
- It's a significant Cornwall USP

THANK YOU