Creative Industries Potential in Lewisham

From Strength to Strength

Scoping Document for the Creative Lewisham Agency, 2003

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1.0 Introduction

This brief report offers a summary of the current size, profile and physical location of the Creative Industries (CI) sector in the London Borough of Lewisham; followed by an assessment of the 'growth potential' of the sector over the next decade. The report is based upon just 4 days intensive qualitative and quantitative research, focused through the following approaches:

- Desk research identifying existing data sources and strategic papers that (may) indicate the size and scope of the local Creative Industrie (CI) sector.
- Telephone interviewing with key intermediaries, gatekeepers and 'knowledge sources' working in the CI sector of Lewisham. 27 individuals/organizations were interviewed (see Appendix 1). Interviews were used to identify further data sources and to explore respondents' knowledge of the size, scope and potential of the local CI sector.
- On-line searching for local CI businesses and organizations, such as through 'local pages' services and the use of search engines and directories.
- An emailed questionnaire to every CI business and organization for which an email address was available (see Appendix 2). This was intended to uncover sub-sectoral profiles, business size (number of employees and turnover), and the ethnicity of the CI workforce.

The Need for Further Research

The short time-span of the research demanded a very intensive and explorative approach, employing overlapping processes of 'information trawling' and the opportunistic pursuit of 'leads' as they became available. The most striking finding of the research is that there is an urgent need to develop a more thorough and comprehensive 'mapping' of the local CI sector. This should focus not just on 'numbers' (for these continually change and are open to contestation dependent upon the 'counting method' and classification system used), but on the qualities of CI networks and supply chain relationships; the connections between the sector in Lewisham and a regional/national/global CI economy; and the key cluster opportunities in a borough with a very fragmented landscape.

Findings presented in this report are thus necessarily provisional, based upon a very short research intervention. Furthermore, projections and 'growth indicators' should be understood with even more caution, with indicators based upon qualitative expressions of 'sector potential' or contingent upon very specific intervention (such as the provision of affordable workspace).

CI Sector Definition

The CI sector is an aggregation of a complex collection of industrial and creative sectors and subsectors, and its 'boundaries' are thus often contested. This research is based on the definition employed by DCMS Creative Industries Task Force[1]:

"Those activities which have their origin in individual creativity, skill and talent, and which have their potential for wealth and job creation through the generation and exploitation of intellectual property. These have been taken to include the following key sectors: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure software, music, the performing arts, publishing, software and television and radio."

[1] *Creative Industries Mapping Document,* DCMS 1998 & 2001

In addition, the visual arts sector is added to this definition for this research (it is a major contributor to the CI economy of Lewisham), along with creative and cultural-focused organizations and projects in the community and voluntary sector (because it is in this sector that local potential is developed).

Overall, the following SIC (Standard Industrial Classification) Codes are employed for this research:

172 Textile weaving
20510 manufacture of other products of wood
221 publishing
222 printing
223 reproduction of recorded media
362 manufacture of jewellery and related articles
363 manufacture of musical instruments
722 software consultancy and supply
742 architectural and engineering activities
744 Advertising
74810 photographic activities
74840 other business activities
921 motion picture and video activities
922 radio and television activities
92311 live theatre presentations
92312 other artistic and literary creation
92320 operation of arts facilities
92340 other entertainment activities
925 library, archive, museums and other cultural activities

The above are the main sub-sectors 'counted' in this research. However the research does begin to engage with a more valuable process that understands the CI sector as operating within a much broader 'Creative Production System'. Here, an understanding of complimentary supply chain and service relationships is considered vital for a detailed and insightful appreciation of the CI profile and dynamics. Such an approach should inform any future development research.

It is important to stress that a range of protocols will exist in relation to each of the data sets provided to or uncovered by TF Consultancy in the course of this study. The process described above was undertaken for two purposes:

- To enable TF Consultancy to develop a snap shot picture of the sector across Lewisham and provide some top line analysis.
- To help TF Consultancy identify an appropriate range of Businesses for telephone interviews and email questionnaires.

This is different from the development of a business database and comprehensive ‘map’ for the CI sector in the area, which does not form a part of this Brief nor is possible given the short timescale for this research.

2.0 Previous Research: The Numbers Game

Despite the significant Creative potential of Lewisham and the connected ambition for Lewisham – outlined by Charles Landry – to develop as a distinctly ‘Creative place’ (Landry 2001), the borough has not as yet been identified by mapping research as a prominent place for Creative Industries development. The highest-profile mapping research focusing on the Creative Industries sector of London – ‘Creativity, London’s Core Business’ (GLA 2002) – celebrates London’s position as a global power in Creative production, with a £21 billion annual output, employing 525,000 people, and expanding in output by 8.5% per year (1995-2000). The report states that the CI sector is presently the 3rd largest sector in London, and is vital for future wealth creation, social inclusion, and for driving forward the identity of London and the UK. The report also states that there are sub-sectoral variations in growth and that the CI sector is more prominent and is growing fastest in specific localities. According to the report, Lewisham is not one of these localities.

Despite being centrally located and well-connected within one of the most important ‘Creative Cities’ in the world, the report indicates that Lewisham is placed 32nd out of 33 London Boroughs in terms of ‘CI employee jobs in 2000’, with just 1,900 jobs. This is of course far behind the Creative economies of SoHo; surprisingly far behind the emergent clusters in the ‘City Fringe’; and alarmingly behind all outer-London Boroughs with the exception of Barking and Dagenham.

As well as being potentially harmful to the initiatives established to support the growth of the CI sector in Lewisham, this ‘position’ for Lewisham is utterly at odds with the perception of the Borough ‘on the ground’. The work of the Creative Lewisham Agency, plus a range of initiatives and projects (from the new Laban Centre to the establishment of a studio complex for Cockpit Arts, based within the ‘Creative Enterprise Zone’), have helped to position Lewisham (and specific districts such as Deptford) as a high growth area for the CI sector; as somewhere with an emerging CI economy; and as a place with a vibrant cultural, Creative and thus CI ‘scene’. This is due to the rather narrow SIC and SOC codes employed by the GLA research team; the absence of an in-depth, primary and applied approach in ‘uncovering’ very small Creative businesses; and – most significantly – the omission of a ‘Creative Production Chain’ approach that realizes the connection between a narrow definition of the CI sector and a wide range of complimentary business sectors. It is a realization of the importance of production chains that surround and underpin the CI sector that allows for an appreciation of the sector’s potential, because this is ‘where’ the social enterprises, the informal networks, the aspirational production communities and thus the potential for growth will be located.

Indeed, research other than that conducted through the GLA presents the CI sector of Lewisham and the Borough’s broader CI potential in a more favourable light. A key study undertaken by Clare Cooper (1999), used a more explorative methodology, following the networks, databases and directories of Lewisham to ‘snowball’ and thus collect evidence of businesses, organizations and individuals working in or aspiring to extend participation in the CI sector. This study uncovered over 550 cultural/creative projects running in Lewisham at that time, plus significant sub-sectoral strengths in visual arts, publishing, performing arts and music. In addition, the study revealed a high degree of CI clustering in the north of the borough (SE8 and SE14), around Deptford and New Cross; and in the Forest Hill area, with different sub-sectoral specialisms in each place (such as a large number of artists and musicians in Forest Hill). Yet the ‘numbers counted’ by this study still under-estimate the ‘true size’ of the sector, and there is a clear need for a more intensive and detailed appraisal of some of the ‘patterns’ and issues revealed by this study if ‘potential growth’ is to be identified and realized.

Image and Workspace Demand – Signs of Change?

A key contextual factor the CI and any other sector in Lewisham is that the Borough has the lowest number of employees relative to working population in London: 64% of Lewisham residents who are in employment work outside of the borough. This is based on a total working population of 93,000, of which 60,180 work outside the Borough (LB of Lewisham 2003). Of course, for an inner-London Borough with improving transport links, a high level of employment ‘leakage’ is inevitable. However, there is evidence that a highly skilled and mobile working population – such as that found leaving Lewisham every morning – will favour opportunities closer to home. This is especially the case if local opportunities can provide the quality of working environment comparable to elsewhere. With the CI sector, a successful local economy relies upon high quality and affordable accommodation, a degree of ‘clustering’ (allowing trade and social relations to flourish), and a profile, ‘place-identity’ and ambiance that introduces a level of comparative advantage to a given location. Such factors have until recent years been relatively absent from Lewisham. However, levels of clustering in Deptford, New Cross and Forest Hill are suggestive of an ‘image change’ for parts of the Borough, coupled with an improvement and increase in business accommodation provision; which together have the potential to convince local residents to develop businesses in Lewisham, and to attract businesses from elsewhere.

There are examples of a significant increase in the demand for and take-up of space by CI businesses in Lewisham. This is detailed in Sections 4 and 5. Yet at this stage, it is perhaps helpful to introduce 2 existing pieces of research. The first, undertaken 'in-house' by the Creative Lewisham Agency, seeks to identify the level of demand for CI space in Lewisham and to translate this into a GDP growth figure:

Creative Business Register confirmed Business Report	Total current area space demand	8,310 sq.m
	Jobs that would be created/relocated	209
	Estimated students/regular users of facility	
as of 17.01.2003	Total increase in sector turnover/Lewisham GDP	£3,044 K

The second, a (Draft) feasibility report (Metaphor 2003) for the use of the old Laban site in New Cross (just outside the Creative Enterprise Zone) as 'Laurie Grove Creative Workspace', identifies a high level of demand for an incubator space targeted at CI entrepreneurs. It is proposed that the site be converted into 31 incubator units, with complimentary rehearsal space, support areas, public space and a café/bistro (totaling 1,220 sqm). This London Development Agency-supported project indicates the potential for transforming old building stock and brownfield land in the north of the Borough, especially given the area's 'strategic location' within the 'Thames Gateway' and heightened 'strategic identity' as an emerging cluster of CI activity. Such issues were not, alas, 'factored in' to the GLA research.