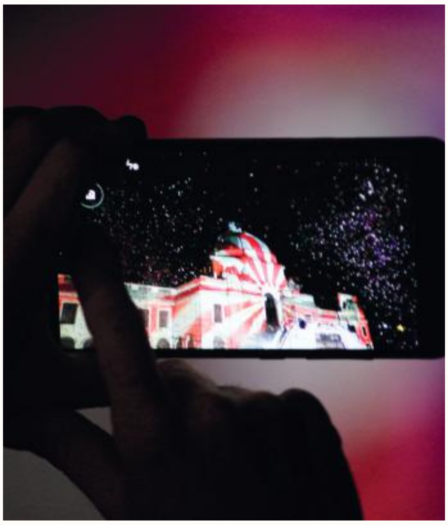
Cardiff University
Prifysgol Caerdydd

Cardiff: Creative Capital
Mapping Cardiff's Creative Economy
2016

British Council | Wales Cymru

Creative Cardiff
Caerdydd Creadigol



British Council:
The British Council is the UK's international organisation for cultural relations and educational opportunities. We create friendly knowledge and understanding between the people of the UK and other countries. We do this by making a positive contribution to the UK and the countries we work with – changing lives by creating opportunities, building connections and engendering trust.

Rebecca Gould, Head of Arts, British Council Wales said: "The Creative Cardiff Network research undertaken by Cardiff University is key to deepening our understanding of Cardiff's fertile creative economy and will provide solid empirical evidence of the cities status as one of the UK's core creative hubs. The symposium offers us a chance to share this research with a wide audience; to invigorate, inspire and educate.

"Creativity, whether it comes from the grassroots, independent organisations or established formal industries, runs through the lifeblood of Wales. Cardiff, as the capital city, is in many ways the epicentre of this. Supporting Cardiff's creative network is important not just from an economic point of view but also from a social perspective."

Creative Cardiff:
Creative Cardiff is a network which connects people working in any creative organisation, business or job in Cardiff and the city region. By encouraging people to work together, we believe that we can make Cardiff the most creative place it can be.

Creative Cardiff is supported by Cardiff University's Creative Economy team in partnership with founder members Wales Millennium Centre, BBC Cymru Wales and Cardiff Council.

Team Creative Economy is: Professor Ian Hargreaves, Professor Justin Lewis, Sara Pepper, Lisa Matthews, Dr Johann Gregory, Kayleigh Mcleod and Talia Loderick.

Acknowledgements

Mapping Cardiff's Creative Economy was compiled and edited by Professor Justin Lewis and co-written by Alice Taylor and Sam Murray.

We also wish to thank Dr Luke Sloan of Cardiff University's School of Social Sciences, Jennifer Hampton and our mapping team: Emma Jones, Melissa Dickinson, Toby Mott and Elliot Hayes.

Contents

The creative economy is the economic output of everyone who does an officially recorded creative job in (for example) the UK, as measured in the official labour force statistics.

The creative industries are a set of named business sectors mostly to do with media (such as music, film, broadcasting and publishing). In the late 1990s, these were identified as being economically (as well as culturally) important and the Government began to collect better creative industries statistics.

Cardiff: Creative Capital

When Cardiff University started planning its creative economy project three years ago, building upon insights from a series of research projects, including the Bristol-centred REACT knowledge exchange hub, we knew that the UK creative economy was enjoying a period of strong growth.

Nesta's figures showed a creative economy accounting for almost 9% of all UK jobs and growing significantly faster than the economy as a whole.

Built upon core UK strengths in arts and culture and the creative industries, and boosted by the collaborative energy of pervasive digital communications, we were confident that the creative economy offered a decisive opportunity for the Cardiff city region, able to develop the cultural assets of a capital city with the energy of a workforce shaped by rapid industrial change.

Today's creative economy spans not only creative industrial sectors such as film, television and gaming, but also the creative dimension increasingly vital to almost all businesses, from cars and shops to banks. Looking ahead, creative workers can also enjoy the thought that as machine intelligence extends its reach, their jobs, creative jobs, will be among those best placed to resist obsolescence.

Creative Cardiff, the online-centred network we launched just over a year ago, is at the heart of our mission to help ensure that Cardiff and its surrounding region makes the most of this opportunity, providing connections between creative communities previously unaware of cross-over opportunities to carry their skills across boundaries into new sectors.

Our starting point was to build an effective and user-tested communications platform for all those who work in the region's creative economy. For this, we needed a much better map and more detailed information about a creative workforce which includes freelancers, part-timers, microbusinesses and volunteers, as well as many more conventional jobs in larger organisations like the BBC.

Professor Justin Lewis' overview of the many strands of our mapping inquiry comprises the bulk of this publication. The research confirmed some things we already knew (our region is strong in television and its supply chain) and some things we didn't know (Cardiff's strength in particular areas of design and in music). Our postcode by postcode detailing of creative work is helpful for a number of purposes: to city planners thinking about re-purposing heritage buildings for new communities, to providers of shared workspaces and other services and for the design and location of education and skills opportunities. The information is also useful to young people emerging from school and university into a jobs market which increasingly involves options of self-employment in a necessarily low overheads start to working life.

We also made a start on interviewing creatives from the large part of the creative economy that sits outside the creative industries – seeking a deeper understanding of their communication networks and connections. We are keeping a close eye upon Nesta's Arloesiadur project for the Welsh Government, which seeks to gather and configure scraped data in a way which enables policy-makers to target growth in sectors where a competitive advantage exists, including the creative economy.

The resulting detailed map of Cardiff as a Creative Capital, however, can never be complete. The story is too dynamic and contestable for that. The changing patterns on the map also need to be understood against a context of the city's continuing challenges, for example in digital and transport infrastructure, as well as in its burgeoning creative strengths which were strikingly illustrated over the unforgettable weekend in September this year when more than 200,000 people gathered in central Cardiff for the City of the Unexpected, a series of events based upon the work of Cardiff's great story-teller, Roald Dahl. This production, drawing on creative talent from throughout the region, arose from an ambitious collaboration between National Theatre Wales and Wales Millennium Centre, two national cultural institutions born in the post-devolution era. Both are Cardiff-based flag-bearers for the nation and both are active at the scale of the tiniest community as well as in the digital world of global reputation.

Cardiff, it is easy to forget, is Europe's youngest capital city and so still growing into the challenges and opportunities of this destiny. Today, it looks forward to a rapid growth in population - forecast to rise by 26% in the next 20 years. A £1.2bn Capital City Deal programme promises to deliver a Cardiff Metro service to augment travel to work opportunities in South Wales and to achieve that growth in a way consistent with Cardiff Council's vision of Cardiff as the UK's most liveable city. On one side of Cardiff Central railway station, a Central Square home for the BBC in Wales is emerging, alongside Media Wales and a re-homed Cardiff University School of Journalism, Media and Cultural Studies. On the other side, there are plans for ambitious new development alongside the River Taff.

From its inception, Creative Cardiff has sought to broker abundant and generous partnerships. Our three founder partners – Cardiff City Council, BBC Wales and the Wales Millennium Centre – have helped us at every stage of this journey and we look forward in the next phase of our work to helping to shape a new and ambitious Creative Cardiff Consortium, supported directly by the City Council and the Arts Council of Wales.

The outcome we seek from these initiatives is an increasingly confident capital city region, celebrating its cultural assets and building jobs and prosperity in a thriving and innovative creative economy.

Professor Ian Hargreaves,
Chair of Digital Economy,
Cardiff University.

Mapping Cardiff's Creative Economy

There is a growing awareness of the importance of the creative economy, not only in its contribution to people's quality of life but as a distinctive segment of the economy in its own right.

Recent figures published by the Department of Culture, Media and Sport (DCMS) reveal that the UK's creative industries, which form the heart of the creative economy, are now worth £84.1 billion per year to the UK economy - growing by 8.9% in 2014, almost double the growth rate of the UK economy as a whole. Research by Nesta suggests that more than 8% of all UK jobs are to be found in the country's creative economy.

Cardiff, and Wales, have strong creative traditions and a significant cultural sector. In 2009, research commissioned by Cardiff Council and the University of Glamorgan (conducted by BOP Consulting), used business survey data and commercial business databases to conclude that the 'creative industries constitute a significant and growing slice of Cardiff's economy, employing more people than legal, accountancy and consulting services combined.'

Following the Hargreaves report in 2011, the Welsh Government identified the creative industries as one of its nine economic priority sectors. Statistics published by the Welsh Government for 2015 indicated that 84,000 people work in the creative economy in Wales. Of these, 53,000 were reported to work in the Creative Industries and 31,000 in creative occupations outside the creative industries. Jobs in the Welsh creative economy were also reported to be higher paid than jobs in other sectors.

In 2015 Nesta produced similar figures, estimating that the creative economy in Wales accounted for 77,483 jobs. Nesta's report also suggests that there were 22,324 jobs in the creative economy within the wider Cardiff Travel to Work area (including the Valleys and the neighbouring city of Newport).

Evidence from various sources thereby confirms intuitive impressions of Cardiff as a creative city with a significant cultural sector that is not only part of the fabric of urban life, but a cornerstone of its economy. However, there is little current data on the shape, character and breadth of the creative economy in Cardiff – data that allows us not only to chart strengths and weaknesses, but to develop firmly grounded strategies for supporting and developing the sector.

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This data deficit also limits the growth of a broadly based creative network in the city. In this sense, Cardiff risks falling behind other cities like Brighton, Edinburgh and Bristol where creative networks play a prominent role in encouraging innovation and collaboration.

This report is the first step in the process of mapping Cardiff's creative economy in greater detail. We understand, of course, that in a rapidly changing sector no map will ever be comprehensive or complete, but we want to provide a more detailed sketch of the character and location of the city's wide range of creative activities.

This work sits alongside the establishment of the Creative Cardiff Network, which launched in October 2015 and sought the same type of data in order to establish connections across the creative economy of Cardiff and the city region.

Professor Justin Lewis,
Professor of Communication,
Cardiff University.

Our methods and approach

Our approach to data-gathering was multifaceted: we harvested existing databases as well as a wealth of local knowledge generated by more informal encounters. In the same spirit, we combined online searches with offline interviews, meetings and consultations.

Our emphasis, throughout, was on the co-production and the co-creation of knowledge - an approach and process of ensuring that we constantly engaged with people in the sector.

Our mapping incorporates all the electoral wards in Cardiff, as well as neighbouring areas around or near the city, including Penarth (four wards), Llandough, Dinas Powys and Sully.

During the course of the mapping, the research team interviewed a wide range of people working in different sectors within the city's creative economy. These interviews included a number of observations about Cardiff's character as a creative city.

Our main sources of inquiry were based on:

- **Gathering existing databases from Cardiff Council and existing networks within sectors (over 40 networks meet regularly in Cardiff).**
- **Desk research using mind mapping, Google searches and Twitter followers of key creative organisations.**
- **Interviews with key figures in various sectors.**
- **An online survey (promoted on postcards distributed to local arts centres, coffee shops, bars, record shops and online networks) and two consultation events.**
- **Attending events to gain information (e.g. BAFTA Wales Games & Interactive Experience Nominees Party, a BECTU networking event, Games Development Wales show, Tech Talk, Creative Mornings, Digital Tuesday and meetings of What Next?).**

We made particular efforts to gather information about freelancers, who are often less visible and subsequently missed in these kinds of mapping exercises. Research suggests that freelancing is becoming more important in all parts of the economy. Forbes estimates that by 2020 50% of the US workforce will be freelance. The Association of Independent Professionals and the Self Employed reported in 2015 that freelancer numbers have increased from 1.40m to 1.91m in the UK; a rise of 36% since 2008.

There are many ways to define the creative economy: we chose to use sector headings that enabled us to make comparisons with other data sets. We began with the UK government's 'creative economy groupings', while taking into account ways in which those working in the creative economy describe themselves.

This meant excluding many of the creative practitioners employed in the city's three universities, as well as a number of activities that are manifestly creative. So, for example, skilled people with a clear professional status (such as architects or broadcast technicians) are generally seen as being part of the creative economy, while those whose skills may involve less formal qualifications or more everyday service provision – such as hairdressers, stonemasons, landscape gardeners, bakers, brewers, chefs and florists – are often not. It also meant excluding many 'embedded creatives' such as, for example, writers or designers employed in other sectors. Our map is constrained by this logic.

Our research on 'embedded creatives', carried out by Samuel Woodford, shows how creative work goes well beyond the creative industries mapped in this report. We spoke to a range of people doing creative jobs in sectors outside the creative industries, many of whom would clearly benefit from more interaction within creative clusters. The digital revolution creates opportunities here, enabling creativity to influence the broader workplace, carrying more creative (and hence commercially advantageous) thought processes and practices with it. Our research suggests that creativity can be seen as growing like a root network, feeling and slowly extending into traditionally non-creative areas as the creative culture we all inhabit becomes more pervasive.

Cardiff's strengths and weaknesses

In total, we identified 2,788 creative companies/organisations and freelancers in the Cardiff area. Some of these companies (such as the BBC) are large and employ significant numbers of people. Most are small or medium sized enterprises.

Fig. 1 shows the total number of creative businesses and freelancers within each creative industries group (as defined by the DCMS), set alongside national employment statistics taken from the DCMS' Creative Industries Economic Estimates. We should note that the data are not directly comparable, since the varying size of creative companies means that their numbers are not equivalent to employment figures. Nonetheless they do provide a useful indication of where Cardiff's creative activity is concentrated against the backdrop of figures across the UK as a whole.

There are four areas where Cardiff appears to have particular strengths (by which we mean comparative volume of activity rather than quality of output). In all four areas the proportions of both companies and freelancers are above the UK employment average.

These areas are:

Music, Performing & Visual Arts:
the largest creative sector in Cardiff, where the proportion of freelancers is four times the national employment average and the proportion of companies/businesses is more than double the national employment average.

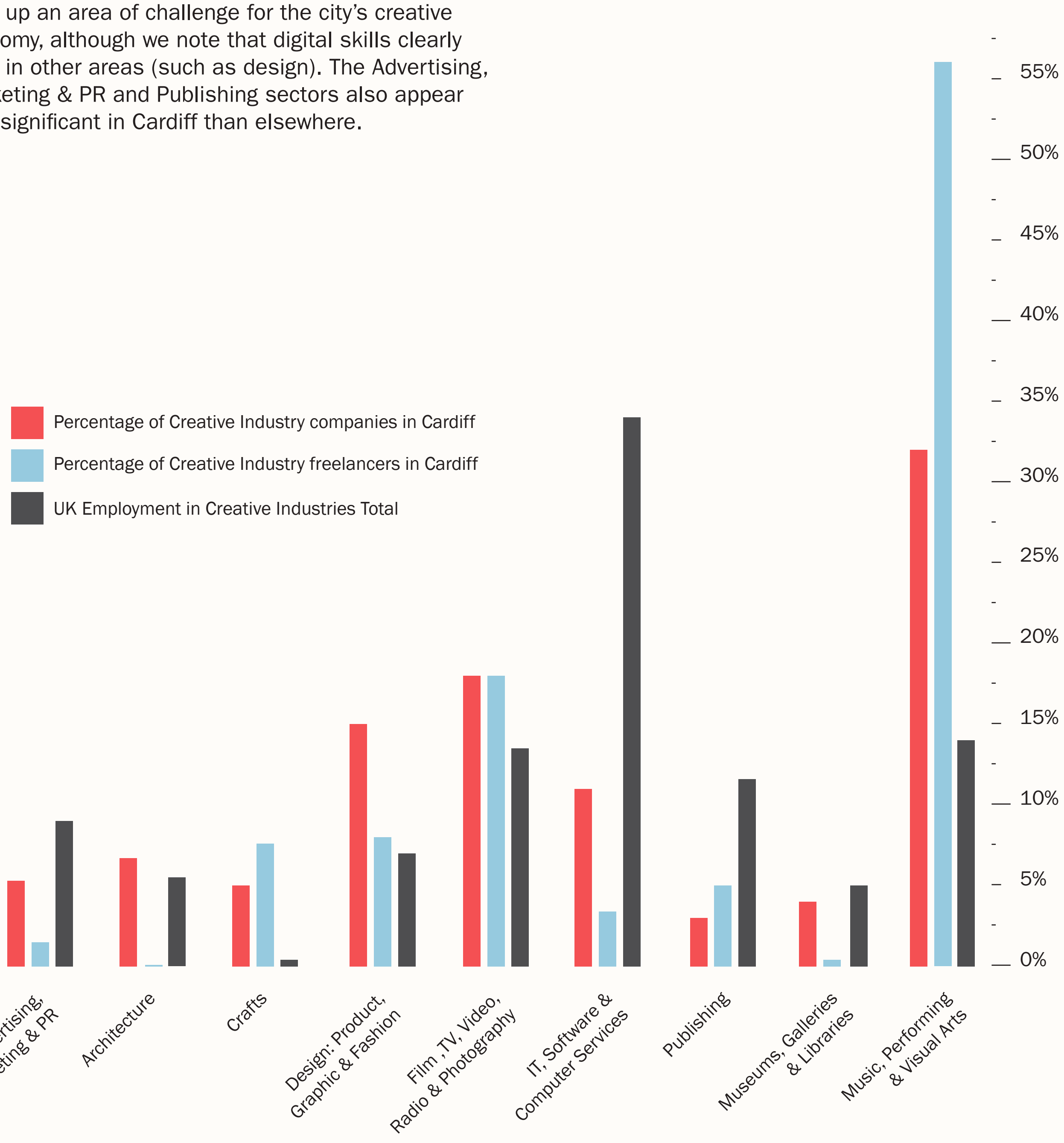
Film, TV, Video, Radio & Photography:
the second largest creative sector in Cardiff, reflecting the growth of a major film and TV cluster in Cardiff Bay, built around the presence of BBC and a substantial supply chain (some of which is housed in the adjacent Gloworks building). Indeed, the presence of a handful of very substantial employers in Cardiff's Film, TV, Video, Radio & Photography sector means that our data may underestimate its overall size.

Design: Product, Graphic & Fashion:
the third largest creative sector in Cardiff, where the proportion of companies is around twice the national average, although the percentage of freelance activity in this sector is more or less in line with UK employment figures.

Crafts:
although one of the smaller sectors in Cardiff, is nonetheless much more significant than the UK employment averages suggest it is elsewhere, with both the proportion of companies and freelancers over ten times the UK average employment figures.

Cardiff figures for both freelancers and businesses in the IT, Software & Computer Services sector are well below the numbers indicated by UK data. Given the salience of technology in the creative economy, this flags up an area of challenge for the city's creative economy, although we note that digital skills clearly exist in other areas (such as design). The Advertising, Marketing & PR and Publishing sectors also appear less significant in Cardiff than elsewhere.

Fig. 1: Overall size of creative sectors in Cardiff compared with UK averages



What kinds of activity and where is it based?

We were able to map most (85%) creative companies, businesses and institutions and just over half (54%) the creative freelancers across 36 wards in and around Cardiff. While we identified creative activities across all wards - most creative companies, businesses and institutions (58%) are clustered in just five wards, all close to or encompassing, the city centre and Cardiff Bay (see Fig. 2).

The biggest concentrations (35% of creative companies, businesses and institutions) are in two of the most central wards: **Cathays** (18%), which includes the city centre and the area to the north (around the university) and north east (Cathays) and **Butetown** (17%), which stretches from the southern end of the city centre to Cardiff Bay. The other main cluster is in the neighbouring wards of **Riverside** (which includes Pontcanna) (10%) and **Canton** (8%).

This suggests that there are two main drivers for the presence of creative activity. Phil George (Chair of Arts Council Wales and formerly co-Director of Green Bay Media) sums these up as 'location' and 'vibe':

- **Proximity to the city centre.** Fig. 3 shows a clear correlation between inner city locations and cultural activity, with notably more creative activity in areas like **Adamsdown** and **Grangetown** than in more suburban areas.
- **The tendency of creative activity to cluster in particular neighbourhoods.** So, for example, both **Canton** and **Plasnewydd** (more specifically **Roath**) have a greater volume and breadth of creative activity than areas at a similar distance from the city centre like **Llandaff North** or **Heath**. Once an identifiable creative cluster develops, it creates a focal point for further activity.

We found the most concentrated clustering in Music, Performing & Visual Arts (68% are in those five wards, with a sizeable cluster in Cathays), Advertising, Marketing & PR (61% - concentrated in Butetown and Riverside), Film, TV, Video, Radio & Photography (60%) and Crafts (60%). The least clustered sectors are Museums, Galleries & Libraries (40%), Architecture (44%) and Publishing (46%).

Overall, our findings confirm a pattern observed in other cities: creative activity tends to cluster both within and across sectors. Fig. 2 also suggests some distinctive clustering by sector. For example, while **Cathays** is a dominant location for many creative sectors, in the Film, TV, Video, Radio & Photography sector it is overshadowed by areas like **Riverside, Canton and Butetown.**

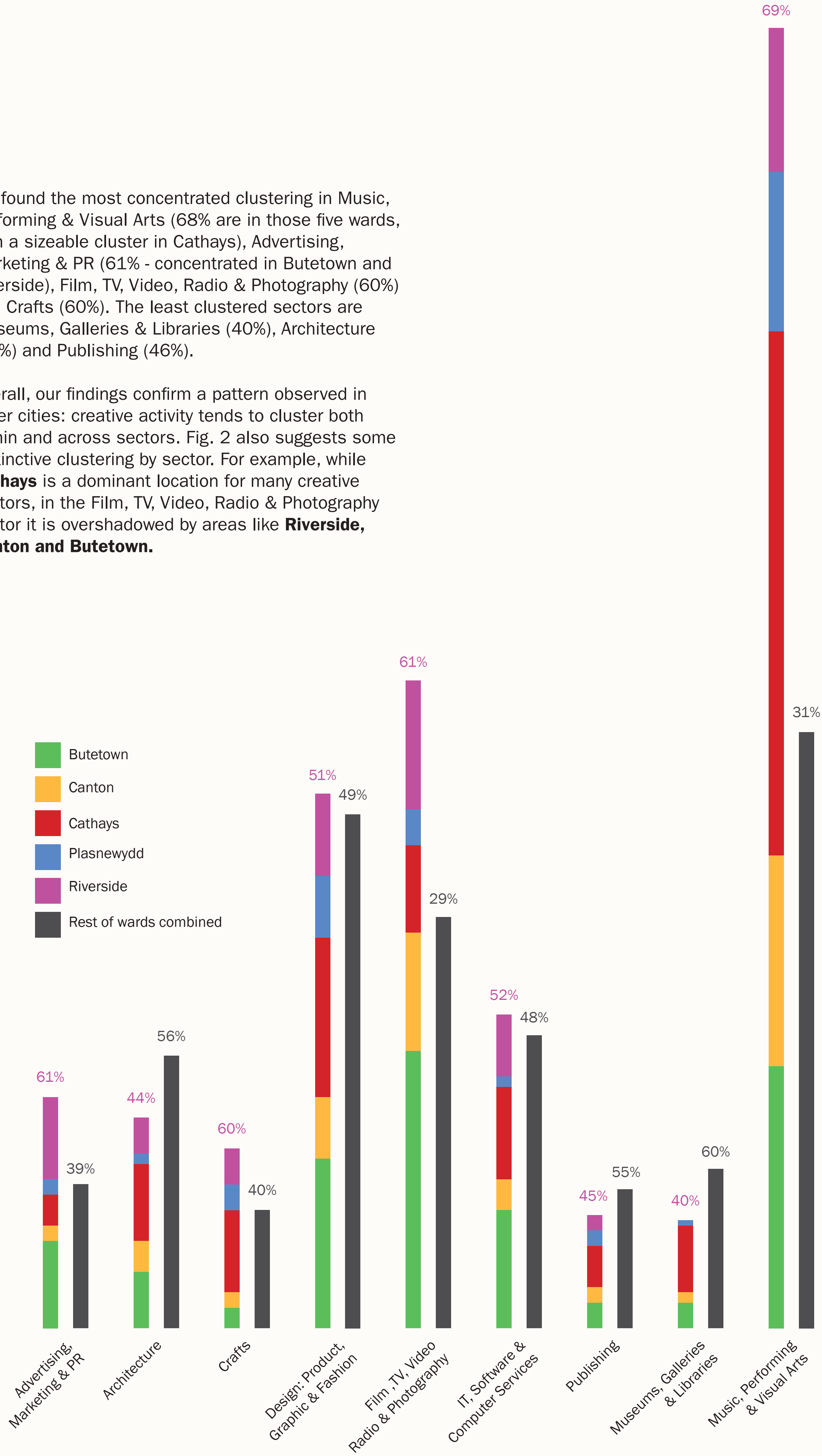


Fig. 2: Concentration of creative companies/institutions by ward

Fig. 3: Creative clusters of Cardiff

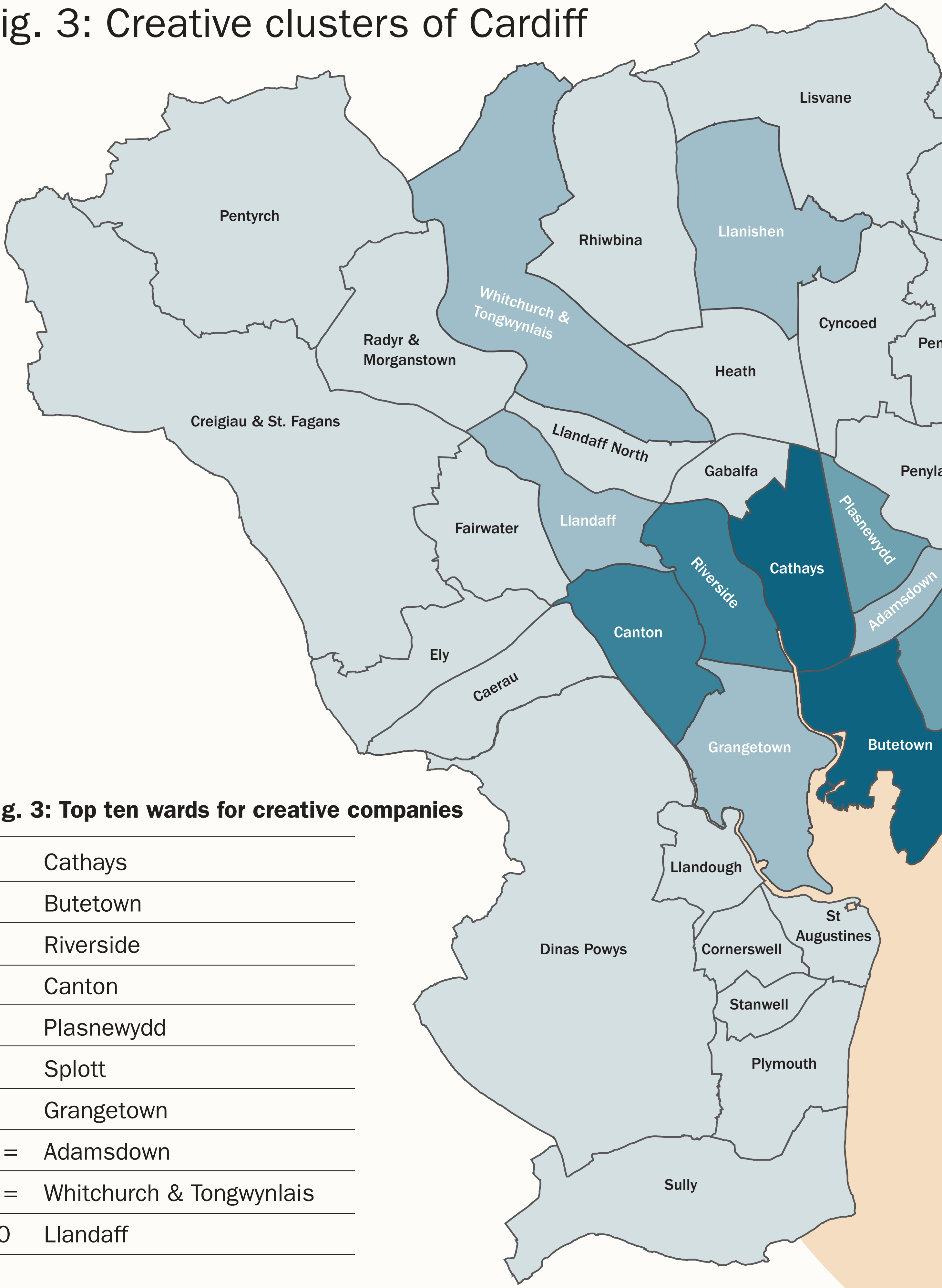


Fig. 3: Top ten wards for creative companies

1	Cathays
2	Butetown
3	Riverside
4	Canton
5	Plasnewydd
6	Splott
7	Grangetown
8 =	Adamsdown
8 =	Whitchurch & Tongwynlais
10	Llandaff

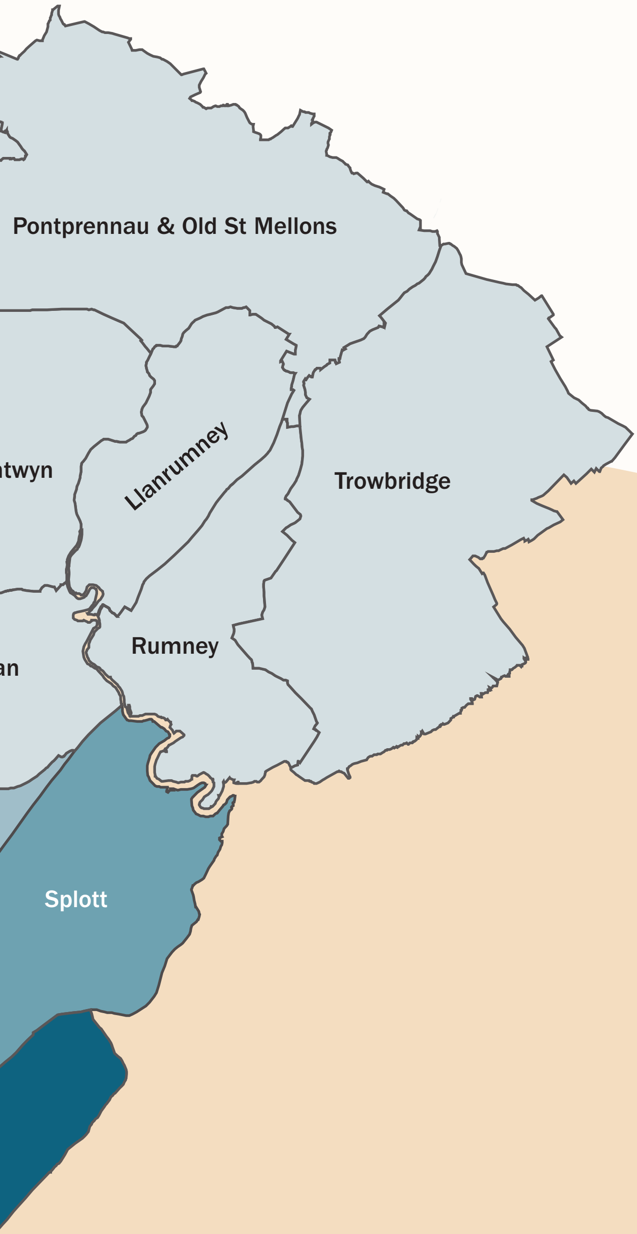


Fig. 4: Top ten wards for freelance creatives

1	Cathays
2	Plasnewydd
3	Riverside
4	Canton
5	Butetown
6	Grangetown
7	Penylan
8 =	Adamsdown
8 =	Llanishen
10	Heath

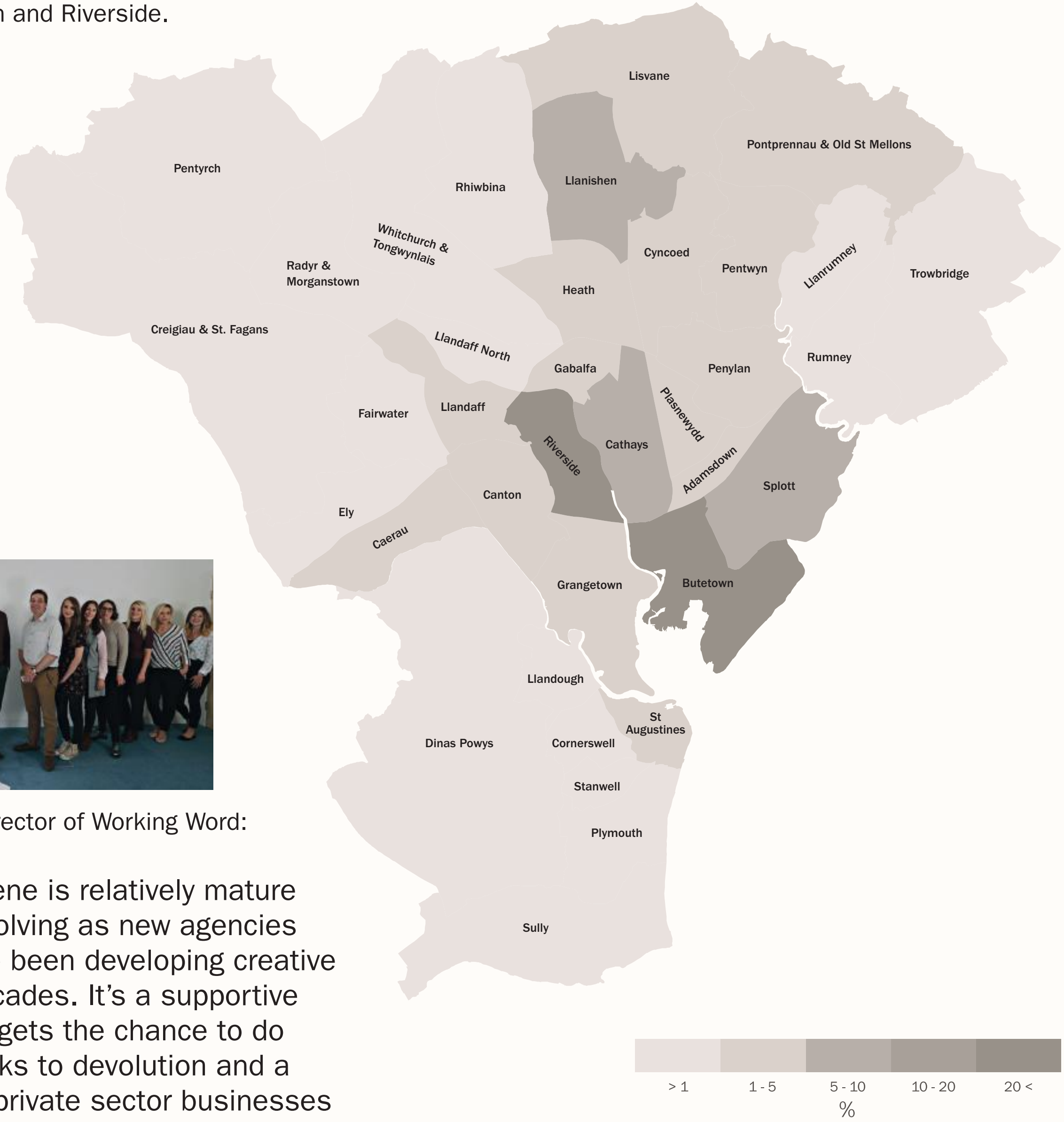
Fig. 4 indicates that freelancers tend to be clustered across the same five wards, although they are a little less concentrated (49% of freelancers are based in these five wards, compared with 58% of companies, business and institutions). Fig. 3 also suggests a fairly high degree of co-location, with the proportion of freelancers matching the proportions of creative companies and institutions fairly closely. **Cathays,** for example, has the highest number of both companies and freelancers.

We nonetheless found some differences in distribution, with a much higher proportion of freelancers in **Plasnewydd** (12% - the second highest concentration in the city after **Cathays**), and a lower proportion in Butetown (17% of businesses but only 6% of freelancers). We also found a number of freelancers based in **Penylan, Llanishen** and **Heath,** none of which are ranked in the top ten for creative companies.

Creative clusters by sector

Advertising, Marketing & PR:

The two main clusters for this sector are in **Butetown** (23% of companies) and in **Riverside** (22% of companies). The majority of advertising agencies are in Butetown while PR agencies are split between Butetown and Riverside.

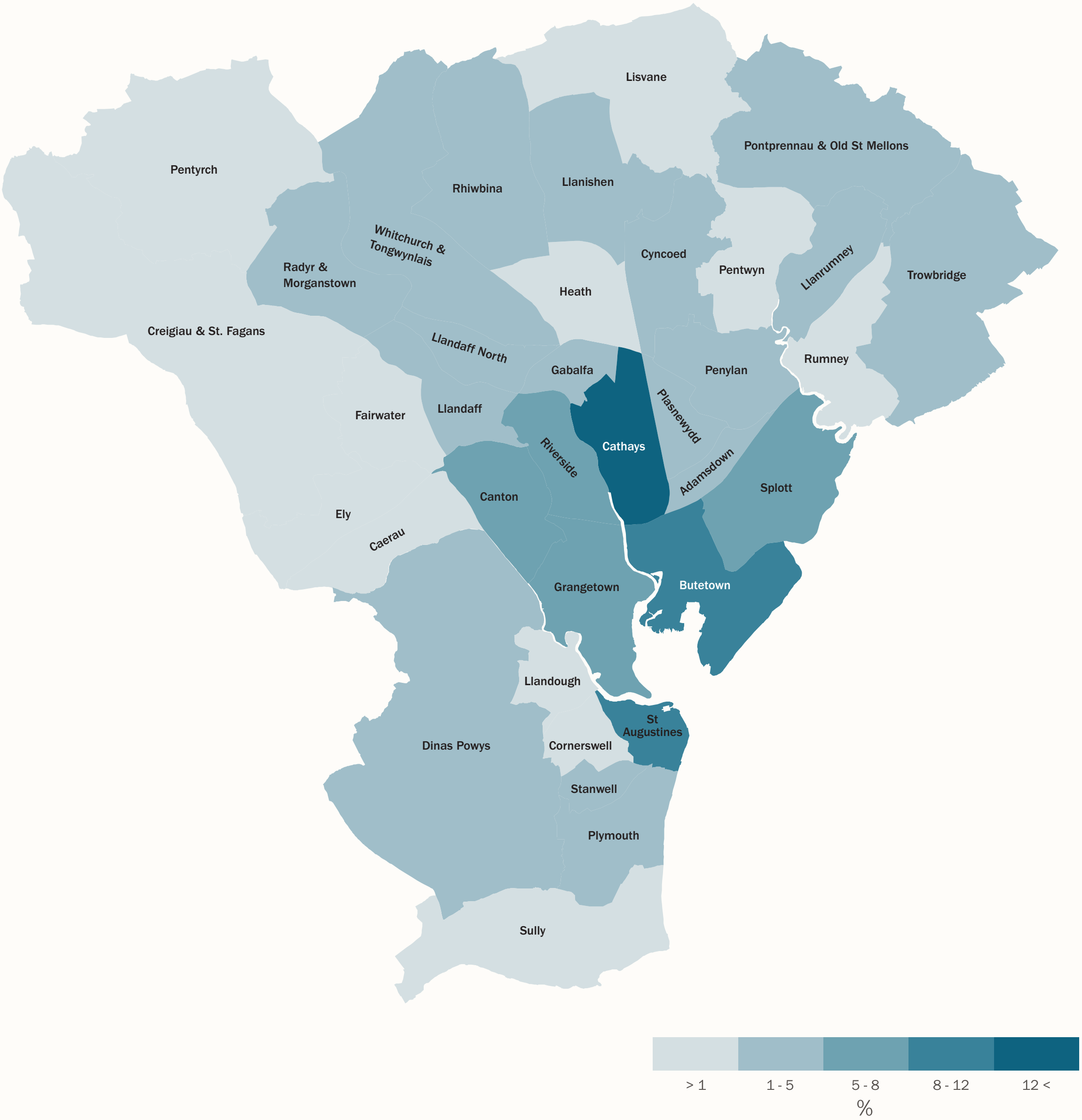


Dan Tyte, Managing Director of Working Word:

"The Cardiff PR scene is relatively mature and constantly evolving as new agencies join others who've been developing creative campaigns for decades. It's a supportive community which gets the chance to do serious work thanks to devolution and a growing trend for private sector businesses to realise London isn't always where it's at. Add to that the range of media outlets based here and how bilingualism makes for more programming opportunities and our location, in the Bay, seems a smart one, close to the seat of government. Where we do have an advantage over other cities in the UK is that Cardiff University has one of the best post-graduate courses in the country, developing the next generation of practitioners. These are often international students keen to make Cardiff their home, bringing a refreshingly different perspective."

Architecture:

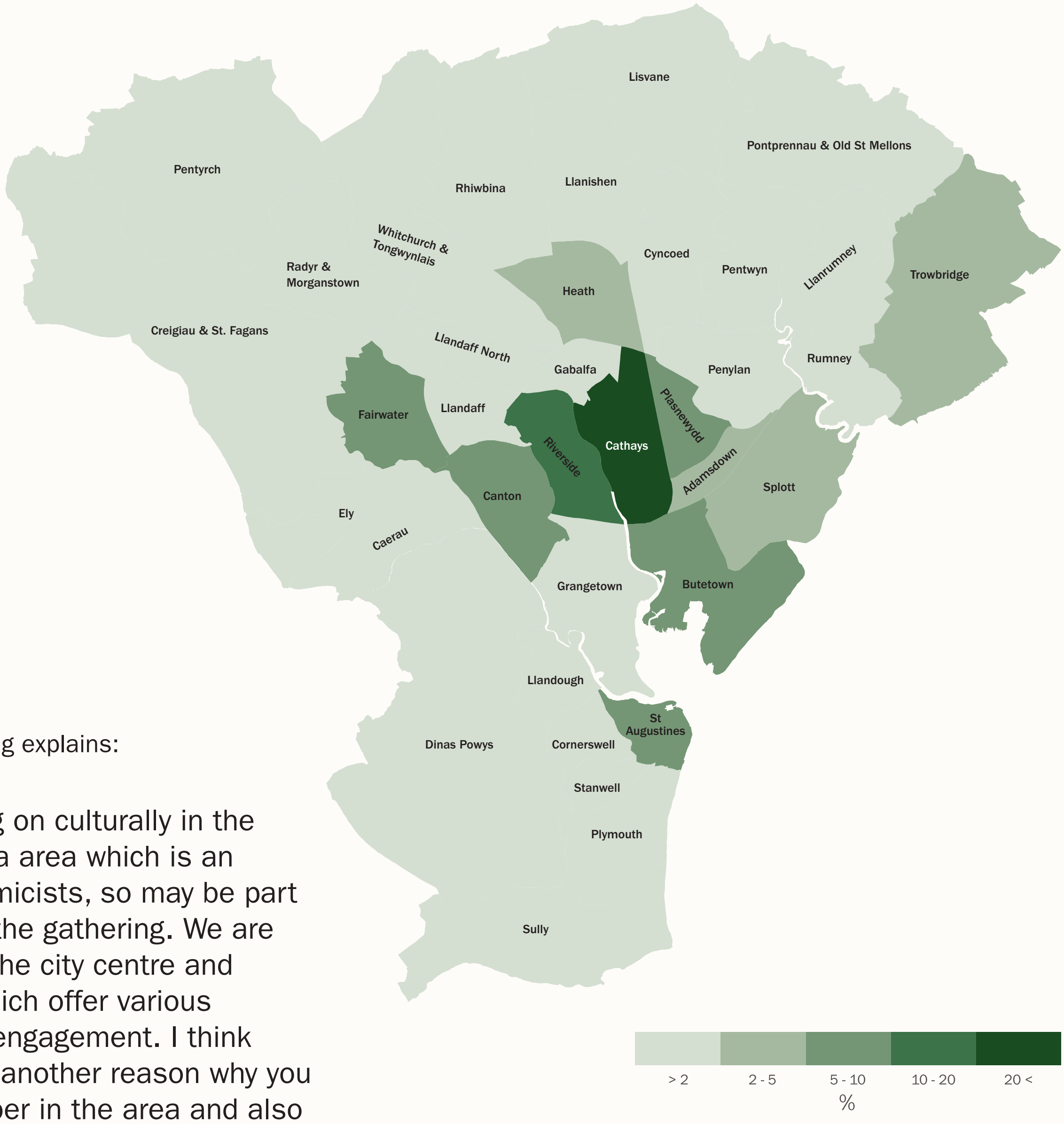
Architects are one of the most widely dispersed group of creatives, based in a range of areas across the city. The greatest concentration of architecture firms is in **Cathays** (16%), **Butetown** (12%) and **St. Augustines in Penarth** (9%).



Crafts:

While many parts of the craft sector in Cardiff are difficult to categorise, the largest single category was handicrafts (mainly businesses) and ceramics (mainly freelancers) followed by jewellery, textiles and woodcraft. While there is craft found in most parts of the city, most businesses are concentrated in **Riverside** (23%) and **Cathays** (16%), with smaller clusters in **Plasnewydd** (10%) and **Canton** (8%).

The cluster of ceramicists in **Riverside** and **Canton** is typical in the sense that these neighbourhoods are seen as lively and affordable creative areas close to the city centre. But it also points to the importance of key infrastructure - notably presence of studios like Fireworks.

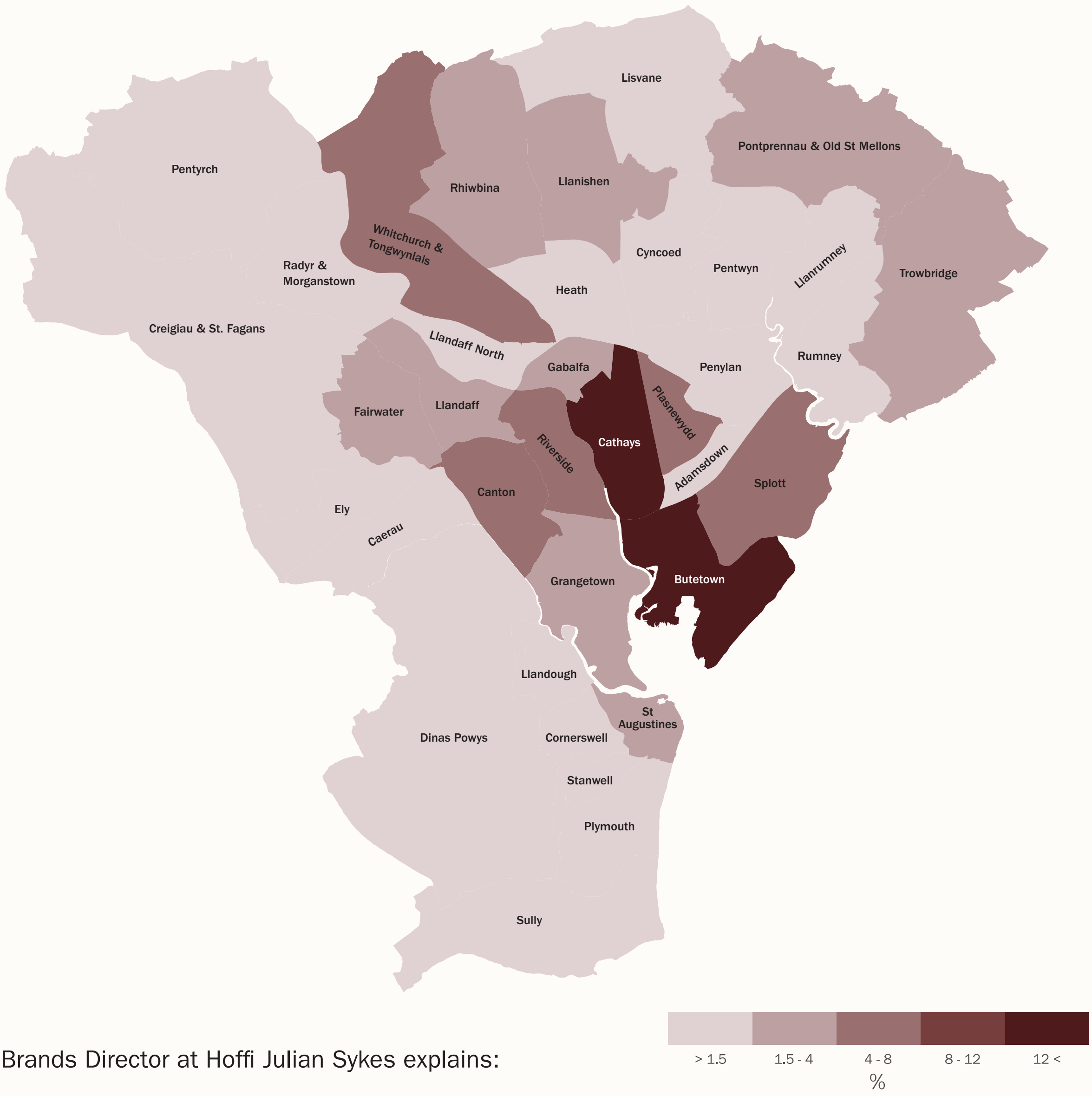


Ceramicist Paul Wearing explains:

"There's a lot going on culturally in the Canton/Pontcanna area which is an attraction to ceramicists, so may be part of the reason for the gathering. We are close to the Bay, the city centre and Chapter - all of which offer various opportunities for engagement. I think Fireworks may be another reason why you have such a number in the area and also the fact that there are other studios in the area - Kings Road, Chapter plus other individual's spaces. I think it likely that if Fireworks was located in another part of the city a lot of its members would also live in that area."

Design: Product, Graphic & Fashion:

Much of the activity in this area is graphic design and web design, although we also found a number of interior design companies. They are dispersed through the city, with the highest concentration in **Butetown** (16%) and **Cathays** (15%), with smaller clusters in **Riverside** (8%) and **Splott** (7%). The largest category of freelancers in this sector are fashion models, none of whom (for understandable reasons) identified their postcode.



Brands Director at Hoffi Julian Sykes explains:

"When we set up Hoffi ten years ago we chose Butetown as the place to set up our studio because of the relative cheap rent and it's good transport links. Since then it seems to have grown further with a number of design agencies also moving in or relocating to the area. Most recently there seems to have been a big growth in co-working spaces which seems to have further broadened the Bay's appeal."

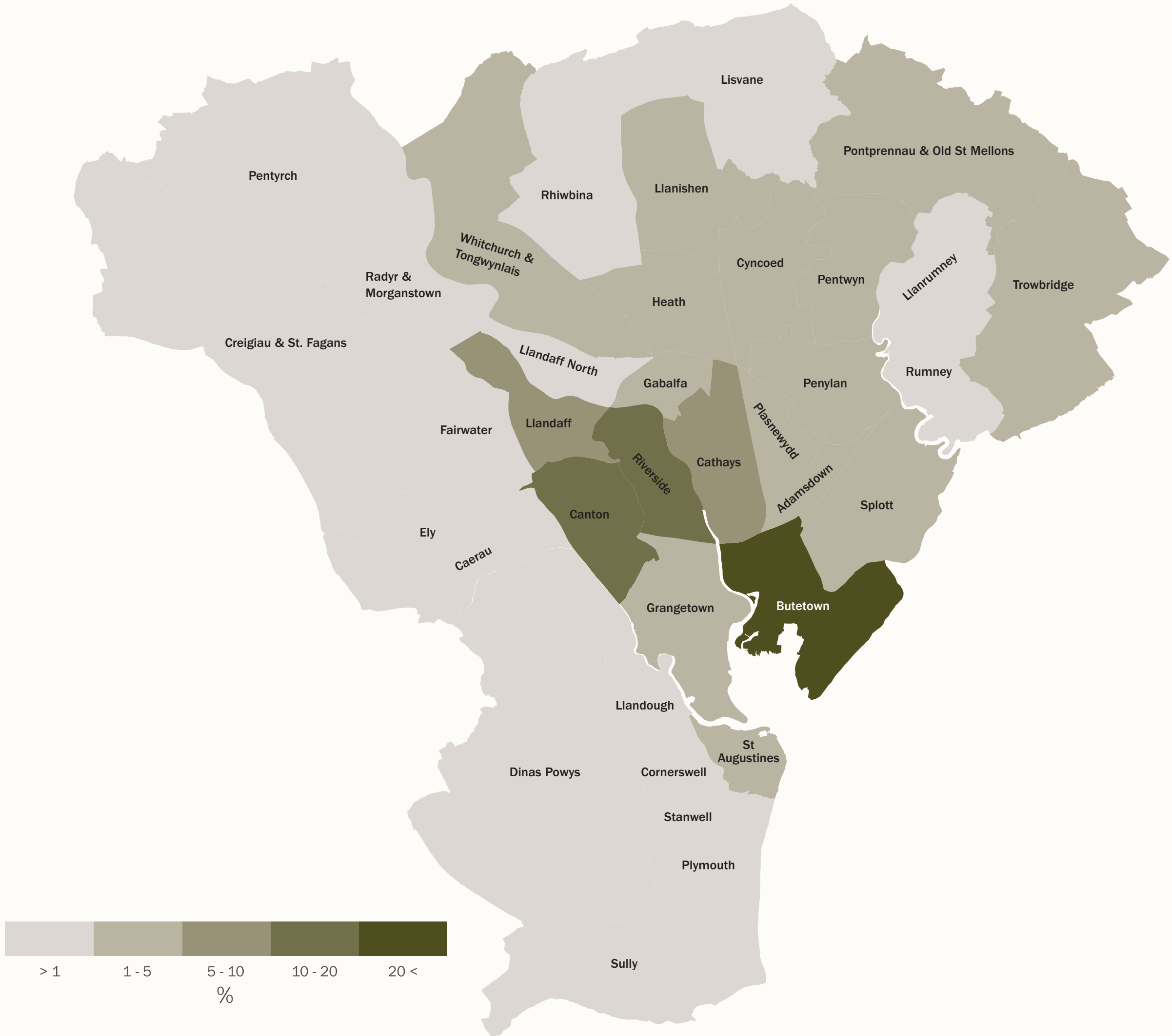
Film, TV, Video, Radio & Photography:

TV, film and video production companies are concentrated in **Butetown** (26%), although there are also significant clusters in **Riverside** (12%) and neighbouring **Canton** (11%), with smaller clusters in **Cathays** (8%) and **Llandaff** (6%).

The presence of the BBC in Cardiff has drawn clusters of production companies around its studios in Roath Lock and in the Riverside/Canton area. Former Creative Director of Green Bay Media, Phil George, described the logic behind this clustering:

"The cluster in Pontcanna and Canton reflect the importance historically of Chapter and the BBC's importance to the sector in Cardiff - as does the Roath Lock BBC Drama HQ plus the Gloworks building intervention which has attracted Gorilla, Boom, Sequence etc. to CF10. And Rondo's move to the Central Station area obviously looks ahead to the BBC's move there. Generally, the Bay area has a history of media activity going back to the late 80s/ early 90s, hence Soundworks in Mount Stuart Square which was once seen as a key hub for creatives, along with Bute Street and West Bute Street. Location and vibe do play a part alongside clustering."

By far the largest group of freelancers within this sector are photographers. While many (around half) did not supply a postcode, those that did are fairly dispersed, with the greatest concentrations in the wards close to the city centre, notably: **Plasnewydd** (15%), **Canton** (13%), **Riverside** (13%) and **Grangetown** (12%) though not, interestingly, **Butetown**.

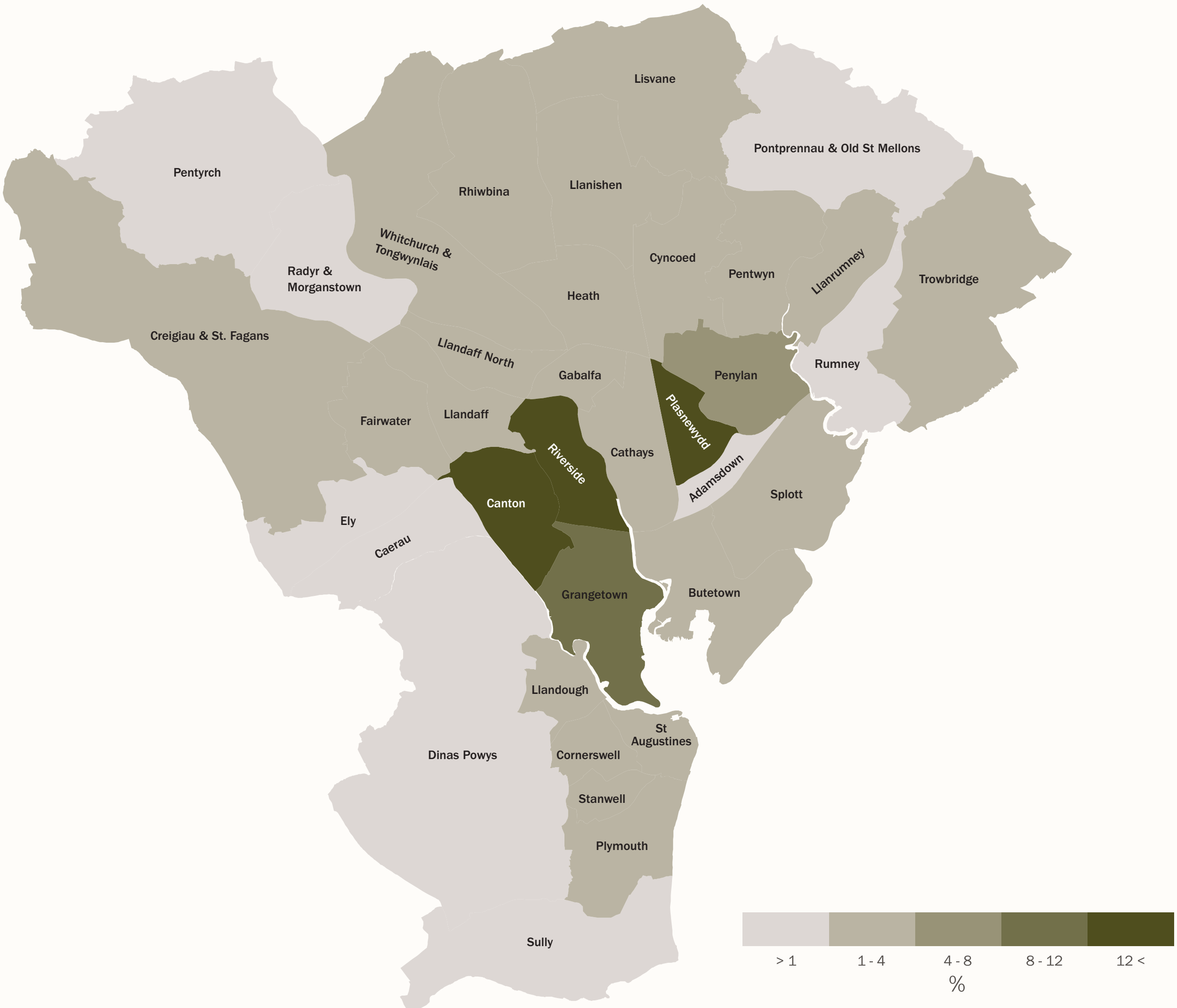


Freelance: Film, TV, Video, Radio & Photography:

Photographer Betina Skovbro explains:

"Generally you live wherever you can afford, I don't think the job itself has any bearing on where you end up living."

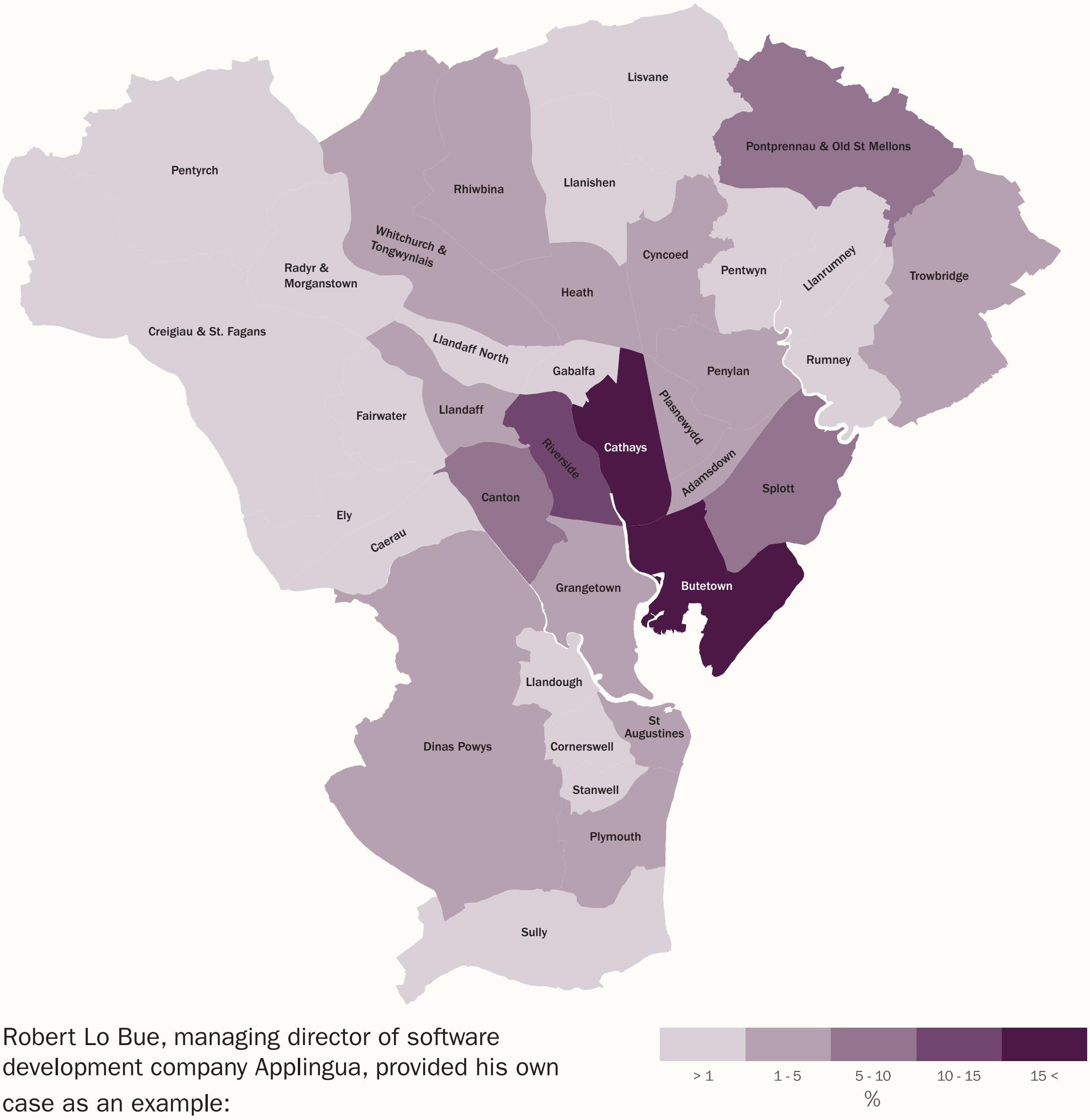
Although like most creatives, photographers are more likely to live in areas with high levels of other creative activity and/or close to the city centre.



IT, Software & Computer Services:

Within the IT, software and computer services, the main area was software development. These businesses are spread across the city, although there are clusters in **Butetown** (20%), **Cathays** (15%) and **Riverside** (10%). Most freelancers in this sector are web designers.

Neil Cocker, the co-founder of digital and tech start-up network Cardiff Start, points out that software development companies situate themselves according to 'creative clustering triggers', such as attraction to shared facilities, living near the city centre and access to good quality broadband.



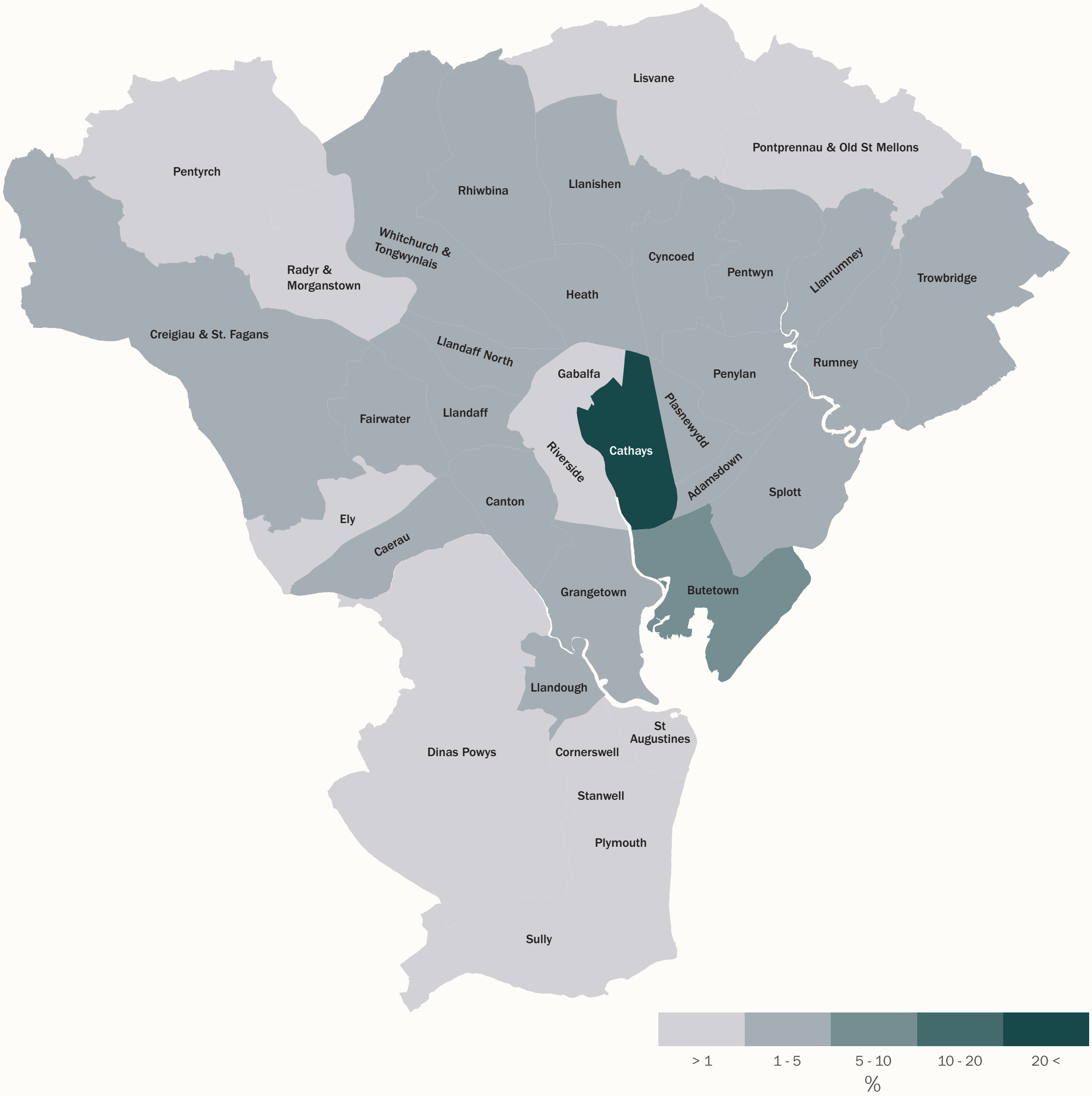
Robert Lo Bue, managing director of software development company Applingua, provided his own case as an example:

"My choice of location was based on several factors: proximity to other companies, proximity to potential shared resources (such as meeting rooms, coffee shops, main train station), ease of commute for me and employees, affordability of office space."

Museums, Galleries & Libraries:

Cathays has a significant cluster of libraries and heritage-based companies and institutions (25%) including museums, heritage sites, libraries and bus/walking tour operators. The largest number of organisations in this comparatively small sector are the council-funded libraries, which are dispersed throughout the city.

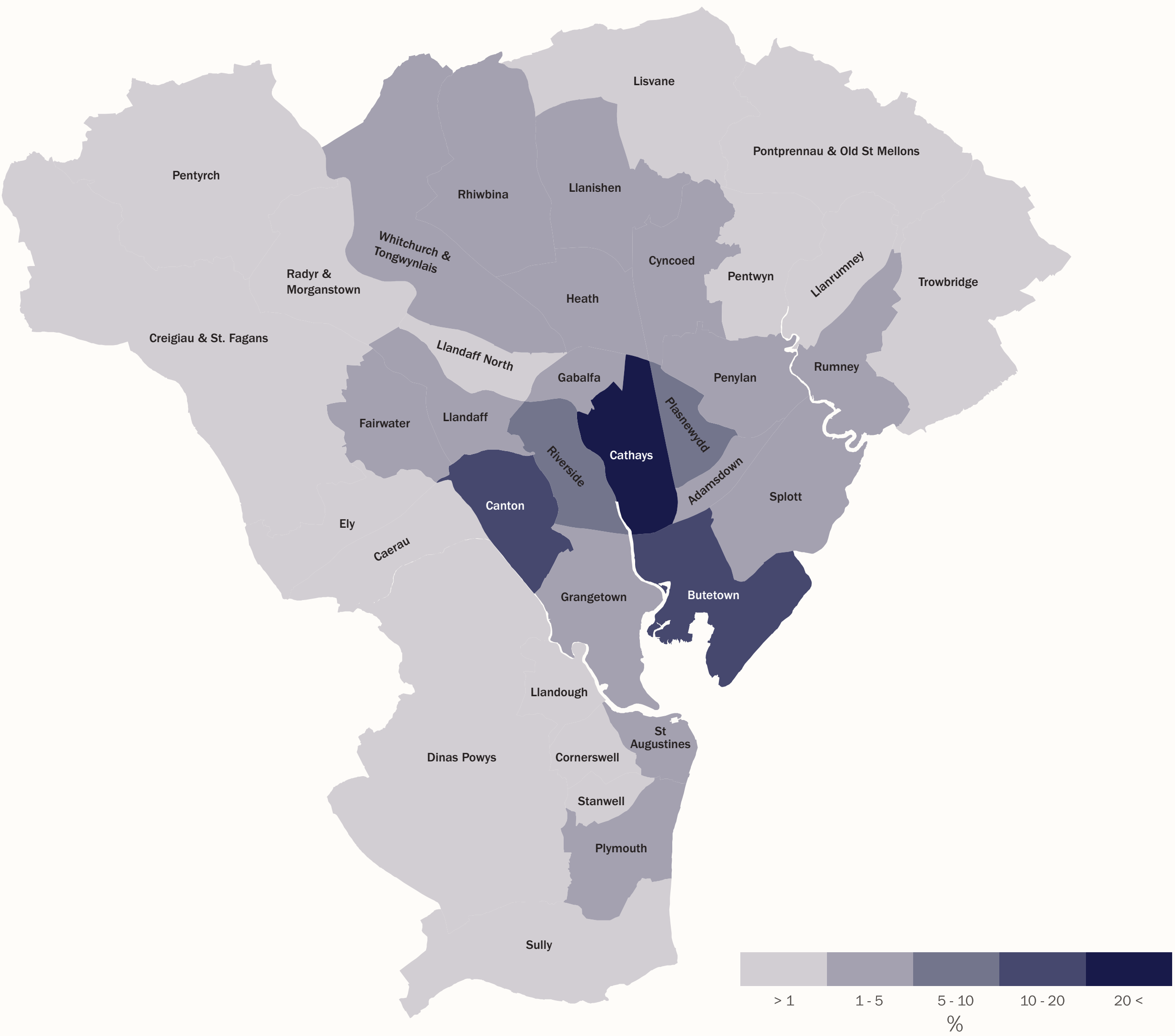
Commercial galleries are classified as part of the Music, Performing & Visual Arts sector. Although Wales has a rich cultural history, there are only a small number of Cardiff-based heritage institutions with the scale to house national collections.



Music, Performing & Visual Arts:

This sector encompasses a wide range of activities, from theatre companies to recording studios and tattoo parlours. Over half the companies in this sizeable sector are in three wards: the largest cluster of companies/businesses is in **Cathays** (28%), with significant clusters in **Butetown** (14%) and **Canton** (11%) and smaller cluster in **Plasnewydd** (8%) and **Riverside** (8%).

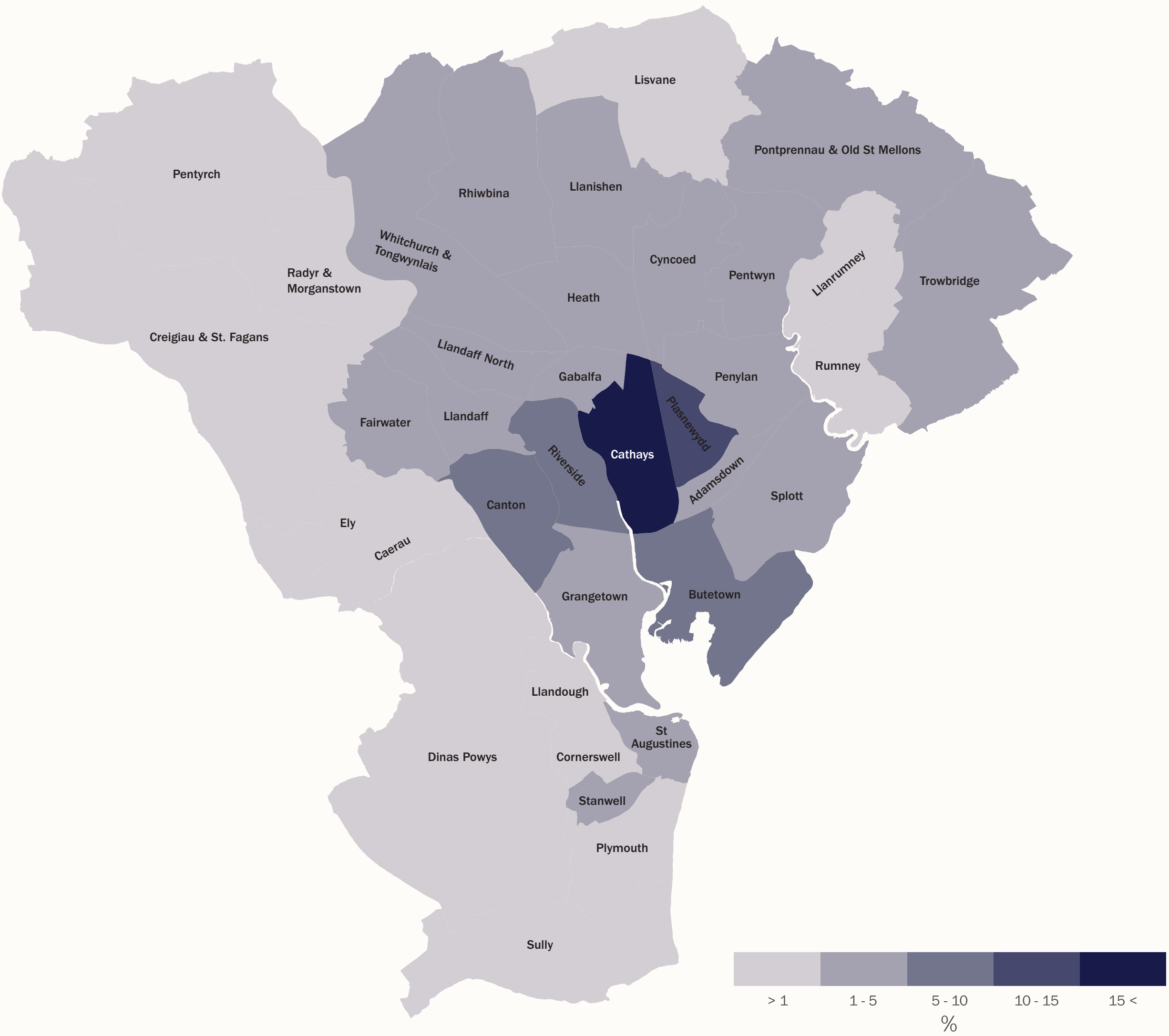
By far the largest number of freelancers in Cardiff’s creative economy work in this sector. They are scattered across the city, with a significant cluster in the neighbouring wards of **Cathays** (18%) and **Plasnewydd** (13%), and a smaller cluster in the neighbouring wards of **Canton** (6%) and **Riverside** (9%). Nearly two-thirds (63%) of freelancers in this sector are musicians and/or music tutors, with the latter being particularly concentrated in **Cathays** (23%) and **Plasnewydd** (13%).



Freelance: Music, Performing & Visual Arts:

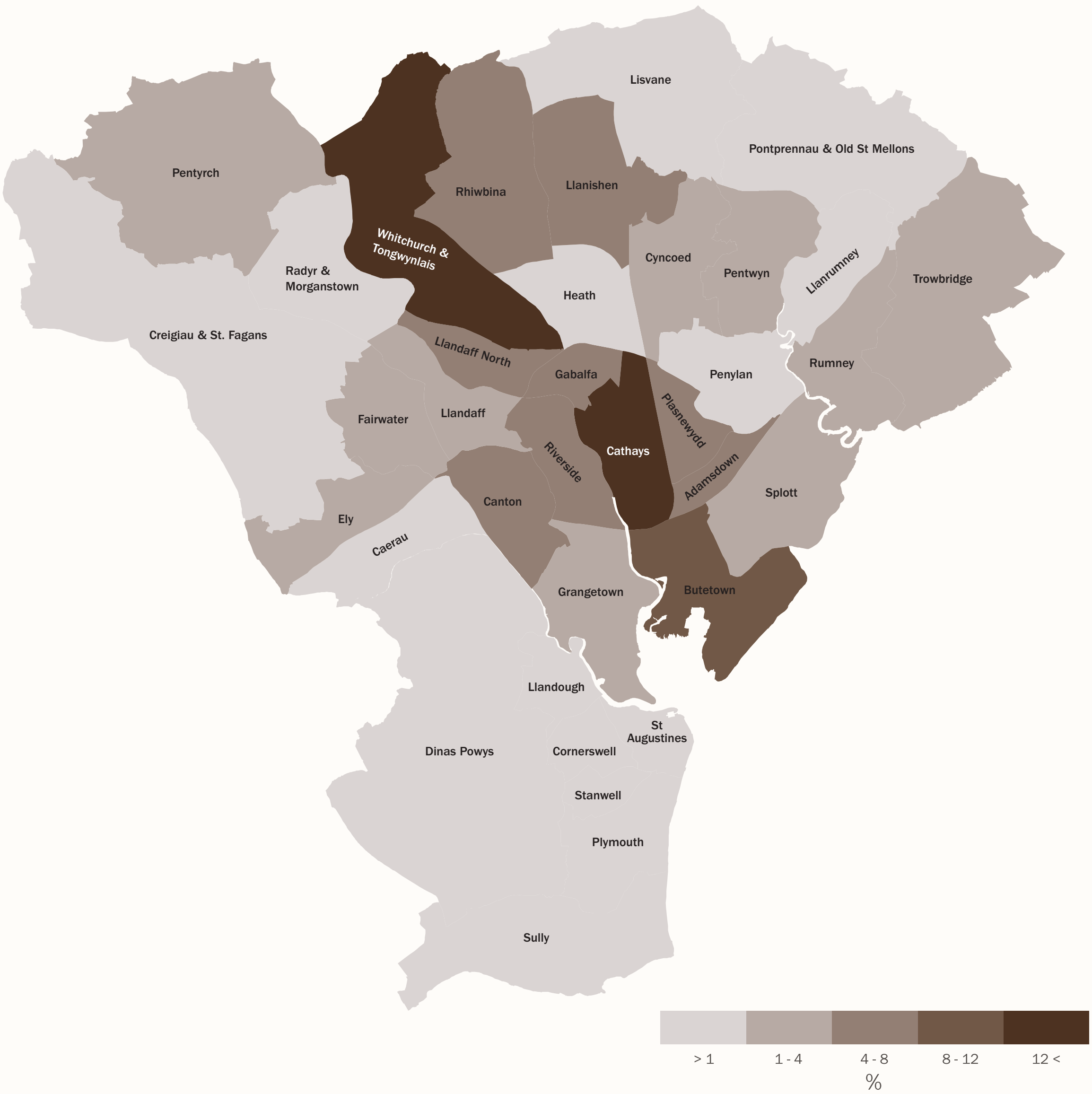
The musician, academic and tutor Joe O'Connell explains the reasons for this clustering:

"A lot of people who may have trained in college, or maybe at the university, while they're training are obviously living in the Cathays area. There is the rental factor as well for musicians; we don't make a lot of money so it's really difficult to find areas to live. You think about areas of the city like Cyncoed and Penylan which are very well-to-do areas and the Cardiff High catchment area - because those areas are generally quite middle class there are going to be more kids having private lessons."



Publishing:

Most companies in this sector are book or newspaper publishers. This sector is more evenly distributed across the city than most, with clusters in **Cathays** (16%), **Whitchurch** (12%) and **Butetown** (10%). Most freelancers in this sector are writers and journalists.



Working together to build a creative capital

It seems like a relatively short time ago that I took up the then newly-created role of Director of Creative Economy at Cardiff University, but incredibly two years have passed since then and a great deal of progress has been made. With an ambition to 'work with others to make Cardiff a capital of creativity' we had set our sights high. Our overarching vision was to better understand and engage the creative economy in order to support and enable the cultural life of the city and the economic activity with which it is connected.

So what have we done? In addition to our work to identify and map Cardiff's creative economy shared in this report, we've been working with partners to develop a creative city network for individuals, organisations and companies working in Cardiff's creative economy. Titled Creative Cardiff, the network went live in October 2015. It aims to draw together individuals and organisations working across the creative industries and the wider creative economy to provide benefits; from learning and skills development to network, capacity and cluster building.

The network recently celebrated its first birthday and there was much to cheer about. In our first year we established a strong online community, itself underpinned by a great programme of events, many of them based upon a simple formula of 'show and tell' which enabled us to meet and share the stories of the incredibly talented and diverse members of our community. We also delivered our ambitious '52 Things' campaign to again draw attention to and share more about the people, places and projects happening across the city. Formal membership of the Creative Cardiff Network has grown steadily to exceed 700, supported by a strong social network of almost 7,000 Twitter followers.

And that is not all. We have also focused on building new links between university researchers and those active in the creative economy. This work has included a variety of new partners and themes; from seeking insights into the response of Sŵn festival-goers to investigating labour market issues in the creative economy.

We've been observing and piloting ideas for shared creative workspaces or hubs of which there has been prolific growth in the last two years. With an estimated 25 hubs now operating within the city region, Creative Cardiff has set itself the task of providing a single source of information about hub spaces along with other useful online information about jobs, contract opportunities and partnerships.

Finally, we have been working with partners to explore better ways of gathering and telling the many stories of Creative Cardiff in a way that enhances the city's creative storyline and brand. Working with individuals, organisations and networks we have been working to understand the best way to build upon a series of 'cultural conversations' launched by the City Council in 2014. We hope to make and share further progress with this in the early part of 2017.

Creative Cardiff's founding partners are three of the core cultural institutions of the city: Cardiff Council, BBC Cymru Wales and the Wales Millennium Centre. Their involvement and support has been indispensible to its achievements to date. Sincere thanks to them for believing in and supporting this venture.

In the main, UK universities have been very good at engaging science disciplines with industry to undertake knowledge exchange and engagement. In my opinion, we have significant opportunities to do more and better within arts and humanities disciplines through Cardiff University's investment in the Creative Economy project. We look forward to the next two years of activity when we will develop and plan the second phase of this work. Watch the Creative Cardiff space because it's sure to be lively.

Sara Pepper, Director of Creative Economy, Cardiff University.