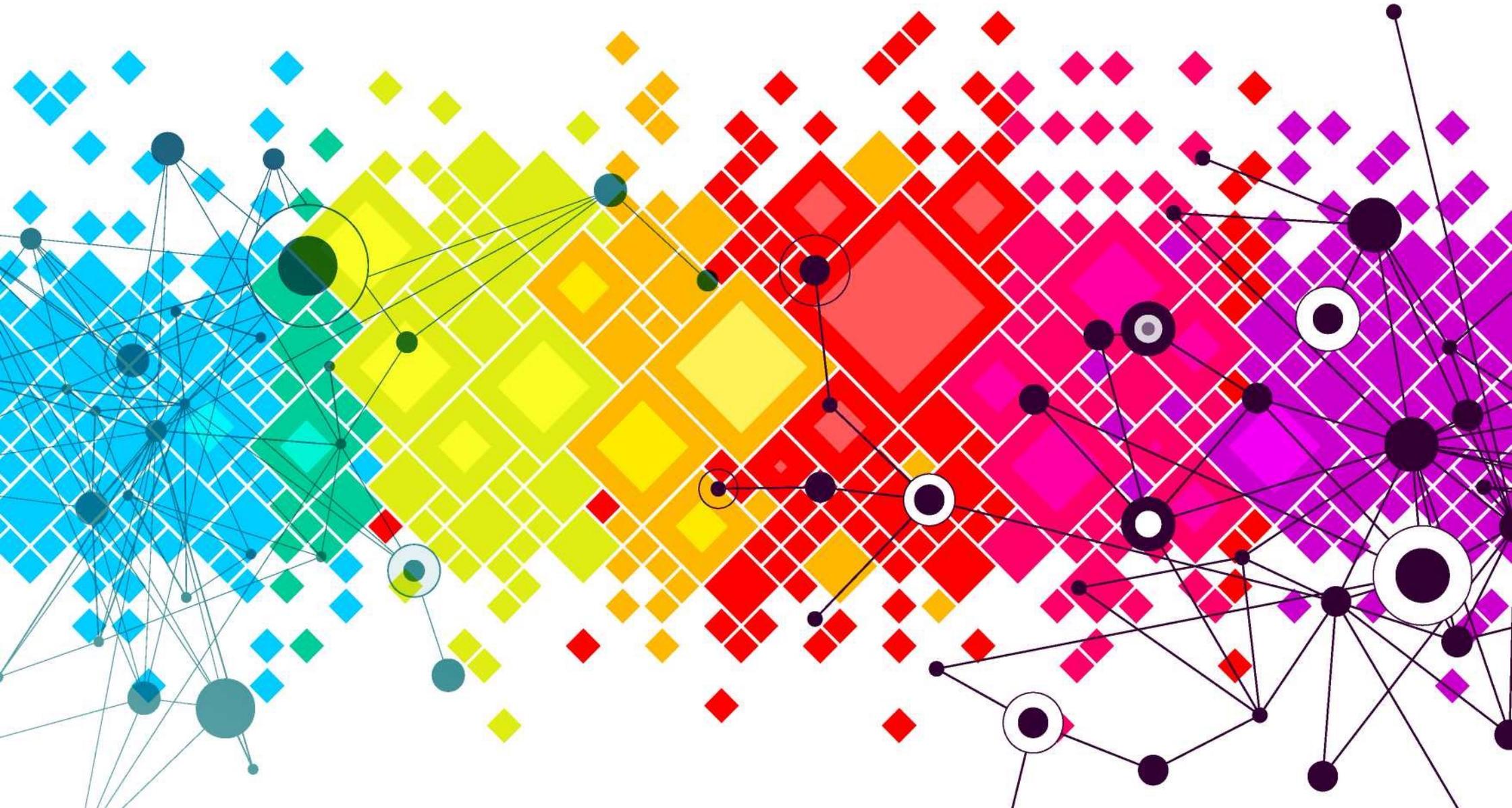


Creative 2023



Berkshire LEP: Creative

Content

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Berkshire

The creative industries are one of the “pillars of the economy” that have been prioritised by chancellor Jeremy Hunt along with technology, green industries, life sciences and advanced manufacturing.

Hunt has said that the creative industries are crucial to supporting the UK’s ambition to foster the next Silicon Valley in technology groups.

The UK is among the leading countries for film and TV production, boosted by access to large stage spaces, tax breaks and the commissioning powers of broadcasters such as the BBC.

The Department for Culture, Media and Sport is developing the plan for growth of the sector across the UK. Frazer will say that the government will support skills, ranging from music and extra-curricular activities for primary school children to boot camps and apprenticeships for those seeking jobs or returning to the workforce.

[Financial Times](#), 2023

Screen Berkshire, an initiative to boost the film and high-end television production industry in the region, was officially launched on October 3, 2023.

This partnership, supported by £600,000 BFI National Lottery funding, aims to enhance the regional screen skills talent pool, increase diversity, and assist local productions.

The launch event at Shinfield Studios celebrated the BFI Skills Cluster's formation, part of a national strategy to develop screen sector skills. Key partners include the University of Reading and Bedlam Film Productions, led by Resource Productions CIC, which also established the Berkshire Film Office with local councils.

The program, spanning three years, focuses on creating opportunities for new workforce entrants, including those from underrepresented backgrounds and over-50s jobseekers, while upskilling current crew members.

[University of Reading](#), 2023

The Thriving Creative Industry of Berkshire

In Berkshire, the creative industry emerges as a key driver of innovation and economic progress. Encompassing arts, design, TV, film, and more, this sector has 7,724 companies, reflecting a turnover of £2.05 billion. This not only underscores the sector's economic significance but also its role in fostering artistic growth.

Comparatively, the digital technology sector, though larger with 25,366 companies, has a substantial turnover of £80 billion and supports about 210,356 jobs. Similarly, the life science sector, with 6,014 companies, generates a turnover of £8.82 billion and employs around 50,103 people.

While each sector contributes uniquely to Berkshire's economy, the creative industry's blend of cultural and economic influence distinctly positions it as a cornerstone of the region's diverse economic landscape.

Economic Fortitude:

- In 2019, Capital income from the sector was £800 million, making up 4.71% of the total across Berkshire. The Gross Value Added (GVA) was £1.1 billion, accounting for 3.20% of the total GVA in 2019.

Job Market Expansion:

- Jobs within the creative industry have seen a remarkable increase from 6,045 in 2013 to 9,344 in 2023, marking a 54.6% growth over the decade.
- This surge significantly outpaces the overall industry job growth of 0.3% in the same period, underscoring the sector's dynamic nature.
- Average wages in the creative industry have also seen a rise, with £34,415 per job in 2021, surpassing the Berkshire average.

Regional Job Dynamics:

- The decade data reflects significant job increases in specific areas such as Windsor and Maidenhead (65.5%) and Wokingham (144.0%).
- Reading stands out with a job increase of 337, a 28.0% rise, indicating the city's growing influence as a creative hub.
- The shift towards the creative sector is evident when compared to the modest changes in job numbers across Berkshire.

*The creative industry includes: Advertising agencies(7311), Architectural activities(7111), Cultural education(8552), Specialised design activities(7410), Book publishing(5811), Publishing of directories and mailing lists(5812), Publishing of newspapers(5813), Publishing of journals and periodicals(5814), Other publishing activities(5819), Publishing of computer games(5821), Other software publishing(5829), Motion picture, video and television programme production activities(5911), Motion picture, video and television programme post-production activities(5912), Motion picture, video and television programme distribution activities(5913), Motion picture projection activities(5914), Sound recording and music publishing activities(5920), Radio broadcasting(6010), Television programming and broadcasting activities(6020), Manufacture of jewellery and related articles(3212)

Source: Beahurst, EMSI

Berkshire LEP: Creative

Berkshire Creative Companies by Size and Local Authority

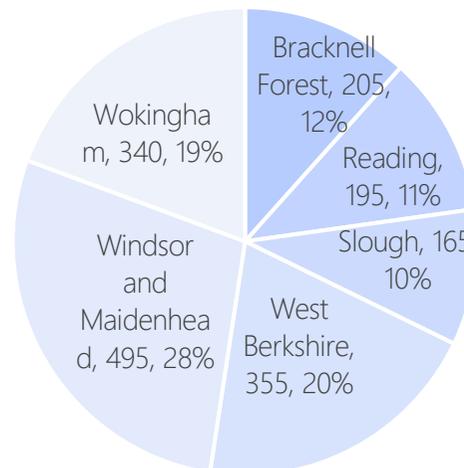
In 2023, the total count of creative businesses across Berkshire stands at 1,755.

- Micro-sized businesses (0 to 9 employees) constitute the bulk of the enterprises with a total of 1,625 businesses, which takes 93%. These are distributed as 190 in Bracknell Forest, 175 in Reading, 155 in Slough, 325 in West Berkshire, 465 in Windsor and Maidenhead, and 315 in Wokingham.
- Small-sized businesses (10 to 49 employees) are significantly fewer, totaling 110, which takes 6%. Their distribution is 15 in Bracknell Forest, 20 in Reading, 10 in Slough, 25 in West Berkshire, 25 in Windsor and Maidenhead, and 15 in Wokingham.
- Medium-sized businesses (50 to 249 employees) are the least common, with a mere total of 15 across all regions, which takes 1%. Specifically, there are none in Bracknell Forest, Slough, and West Berkshire. There are 5 in Reading, Windsor and Maidenhead, and Wokingham respectively.

There are no large-size creative businesses (more than 250 employees) in Berkshire.

Key Sectors

- **Media Production:** The standout sector is media production, including motion picture, video, and television program activities, with a total of 510 enterprises, taking 29%. Windsor and Maidenhead are the epicenter of this sector, which has 185 businesses.
- **Design and Advertising:** Comprising advertising and design activities, these sectors have a substantial influence, with a total of 685, taking 39%. Windsor and Maidenhead again lead with 190 businesses.



Source: [NOMSI](#)

Distribution of Major Creative Companies in Berkshire



TV & Film

1. Aston Productions
2. Aurra Studios
3. Bray Studio
4. Cube Studio
5. Dustoff Films
6. Emotion Systems
7. Enhance Hosting Automation
8. Keen City
9. Shinfield Studios
10. Winnersh Studio

Publishing

11. 51 Degrees
12. Climategames
13. ComponentSource
14. FullCircl
15. Hug-a-Bug World
16. Konsentus
17. Lantana Publishing
18. Megabuyte
19. Red Whale
20. The Yattendon Group

Design

21. Design LAB Innovation
22. Imagine Events
23. Lumi-Plugin
24. NatureBureau
25. OMM

Advertising

26. Ad Moto
27. CAN Advertising
28. Mass Media Outdoor
29. N2O

UK Government Policies: Fueling Growth in the Creative Industries

The UK Government's policy framework for the creative industries is designed to bolster economic growth and innovation.

Acknowledging the sector's £108 billion annual contribution and its role in employing over 2.3 million people, the government aims to increase the industry's output by £50 billion and create a million new jobs by 2030. Key to this ambition was the £1.57 billion Culture Recovery Fund, highlighting the government's support during challenging times like the pandemic.

The UK Government's vision for the creative industries is rooted in a comprehensive policy framework aimed at driving economic growth and fostering innovation.

In the 2023 Spring Budget, the government also set out steps aimed at giving businesses the stability and confidence they need to invest and grow during the challenges with cost of living.

Innovation is central to the policy, with the National AI Strategy positioning the UK as a leader in integrating AI with creative content. The government also emphasizes skill development through initiatives like the Cultural Education Plan and improvements in creative apprenticeships.

Investment in creative clusters and collaboration with local governments for strategy development are also policy priorities. Intellectual property protection and online infringement are key focuses of the Intellectual Property Office, ensuring a beneficial environment for all stakeholders in the creative industries.

Furthermore, cross-economy strategies like the UK Digital Strategy and the UK Innovation Strategy support the creative industries, with Investment Zones and funding for UK Catapults fostering broader economic growth. The government's multifaceted policy framework aims to enhance the creative sector's global competitiveness and economic impact.

Source: [Department for Culture, Media & Sport](#)

Berkshire LEP: Creative

Advertising

Sector Study



Advertising

As discussed by Jeremy Bullmore¹, is more than just selling products; it's a key part of our competitive economic system, spurring innovation and product improvement. It emerged naturally with the Industrial Revolution, bridging the gap between distant producers and consumers. Advertising also inadvertently supports media development, keeping costs low. Bullmore proposes a revised definition: "Any communication, usually paid-for, specifically intended to inform and/or influence one or more people," highlighting its diverse roles in society beyond commercial promotion.

Advertising in Berkshire²

The advertising sector in 2019 contributed £162million to earnings, which is 0.93% of the total earnings of Berkshire. Capital income from the advertising industry was £147million representing 0.88% of the total capital income in Berkshire. Lastly, the Total Gross Value Added (GVA) by the advertising industry was £312,million, making up 0.89% of the total GVA.

Advertising in the UK: An Overview³

The UK is a top European market in advertising, spending £39.4 billion in 2022. Digital ads saw a 15% increase, with £12.5 billion spent in the first half of the year alone. Advertisers are shifting from offline to digital and brand-building formats, with over half investing in services like ITVX and All 4. Despite these changes, the UK advertising market is projected to grow by 9.2% to £35 billion.

The UK Ad Market: Growth and Trends

The UK ad market is expected to hit \$27.74 billion by 2027, with a 10.45% CAGR from 2023. The digital sector's average annual growth rate was 10.5% from 2018 to 2023, reflecting the global trend with a 5.1% CAGR and an anticipated \$391.6 billion in revenue by 2023.

Popular Ad Media in the UK

While traditional media like TV and radio maintain relevance, digital platforms are projected to claim over 75% of ad spend by 2025. Online video ads are surging, with £5.5 billion spent in 2021, a quarter of the UK's total digital ad expenditure.

Source: 1.[Advertising Association](#),
2. EMSI, 3.[Publift](#)

Advertising Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	280	250	25	5	0	223 m	4,500	2
Enterprise M3	595	545	45	5	0	144 m	3,500	1
OxLEP	245	220	20	0	0	29.9 m	2,500	2
Buckinghamshire	225	215	10	0	0	55.6 m	900	1

In 2023, Berkshire's advertising sector is a significant contributor to the regional economy, with a total of 280 businesses. It boasts a substantial base of micro-sized enterprises (250), which form the foundation of the sector, accompanied by a notable count of small (25) and medium-sized (5) businesses. The presence of two scale-up businesses further indicates an ecosystem supportive of business development and innovation.

With a total turnover of £223 million and 4,500 employees, Thames Valley Berkshire not only outstrips Buckinghamshire in turnover and workforce size but also demonstrates higher economic activity and employment opportunities within the sector compared to OxLEP.

In contrast to Enterprise M3, which leads in the overall number of businesses and employees, Thames Valley Berkshire shows a more favorable ratio of turnover to business count. This suggests that Thames Valley Berkshire businesses might be achieving higher productivity and efficiency. The dual presence of scale-up businesses also reflects a dynamic and entrepreneurial advertising sector, potentially driven by favorable economic policies, strategic partnerships, and a focus on high-growth potential within the region.

Major Companies in Advertising



Ad MOTO is transforming outdoor advertising with technology-driven visibility in busy areas and options for comprehensive market coverage. Their eco-friendly, electric ad-scooters offer dynamic advertising with measurable impacts, appealing to brands prioritizing sustainability and innovation. Financial growth in intangible assets highlights their investment in advanced capabilities. Ad MOTO is a top choice for eco-conscious, trackable advertising solutions.



For further information go to:
<https://www.ad-moto.com>



CAN Advertising focuses on meaningful relationships in healthcare advertising. Collaborating with a range of pharmaceutical companies and charities, they emphasize creating memorable campaigns and educational tools that foster strong bonds between doctors and patients. With a human-centric approach and a commitment to inclusivity and talent development, CAN is dedicated to making a positive impact in healthcare communication.



For further information go to:
<https://www.can-advertising.com>

Major Companies in Advertising



N2O champions brand engagement through human connections, aiming to create a community around each brand.

With a mission focused on connecting brands and people, they've become leaders in providing memorable brand experiences across various platforms. Renowned for their strategic, data-driven campaigns, N2O crafts narratives that turn audiences into brand advocates, earning the trust of leading household names in the process.



For further information go to:
<https://www.n2o.co.uk>



Mass Media Outdoor Limited is revolutionizing Digital Out of Home (DOOH) advertising in the UK. They specialize in placing digital ads in high-traffic areas, making advanced advertising solutions accessible and affordable for all brands. They support direct businesses in maximizing their advertising impact and collaborate with landlords to expand their digital screen network, offering substantial ROI opportunities. Mass Media Outdoor's approach positions them as a prominent figure in the digital outdoor advertising sector.



For further information go to:
<https://mass-media.co.uk>

Network and Specialism

Diverse Agencies with Specialized Services

Berkshire's advertising industry stands out with its remarkable network advantage. The region is a hub for a wide array of advertising agencies, each bringing unique strengths and specialties.

This network fosters extensive collaboration and partnership opportunities, enabling agencies to combine their expertise to deliver comprehensive solutions.

The proximity of Berkshire to major economic centers like London further amplifies its networking capabilities, particularly with the presence of global advertising giants like WPP in London.

The presence of such a powerhouse nearby provides opportunities for local agencies in Berkshire to tap into global trends, resources, and partnerships.

University of Reading is Cultivating Future Marketing Talent for Berkshire's Advertising Industry

The University of Reading enhances the talent pool in Berkshire's advertising industry with its innovative marketing degrees, accredited by the Chartered Institute of Marketing (CIM).

These programs not only offer graduates key exemptions in professional marketing modules but also cultivate a blend of specialist skills and real-world insights. **With a strong focus on consumer behavior**, these courses provide students with deep understanding and practical applications in marketing, informed by psychology and economics. The university's strong industry connections, bolstered by its strategic Thames Valley location, create invaluable networking opportunities, making its graduates well-equipped for diverse roles in advertising and marketing.

Labour Market Information

Occupations

Berkshire shows a robust employment scenario with 5,182 jobs reported in 2022, demonstrating a 1.0% year-on-year growth which slightly exceeds the national average of 0.9%. However, the average wages in Berkshire, at £35,101, are below the national average of £36,024.

The regional breakdown from 2022 to 2023 shows a mixed trend. Wokingham experienced the highest growth of 3.5%, adding 72 jobs, Windsor and Maidenhead also saw an increase of 2.9%. West Berkshire's job count rose slightly by 1.3%. However, Bracknell Forest, Reading, and Slough saw a decline in advertising jobs by 8.0%, 7.5%, and 2.9% respectively.

The national industry's workforce is predominantly young, with the majority (43.6%) aged between 25-34, followed by the 35-44 age group at 23.1%.

Newly Unique Postings Jobs

There's 1,236 unique postings in the period from October 2022 to October 2023.

The competition among employers is relatively high, with 108 employers actively posting out of a total of 13,525 in the industry.

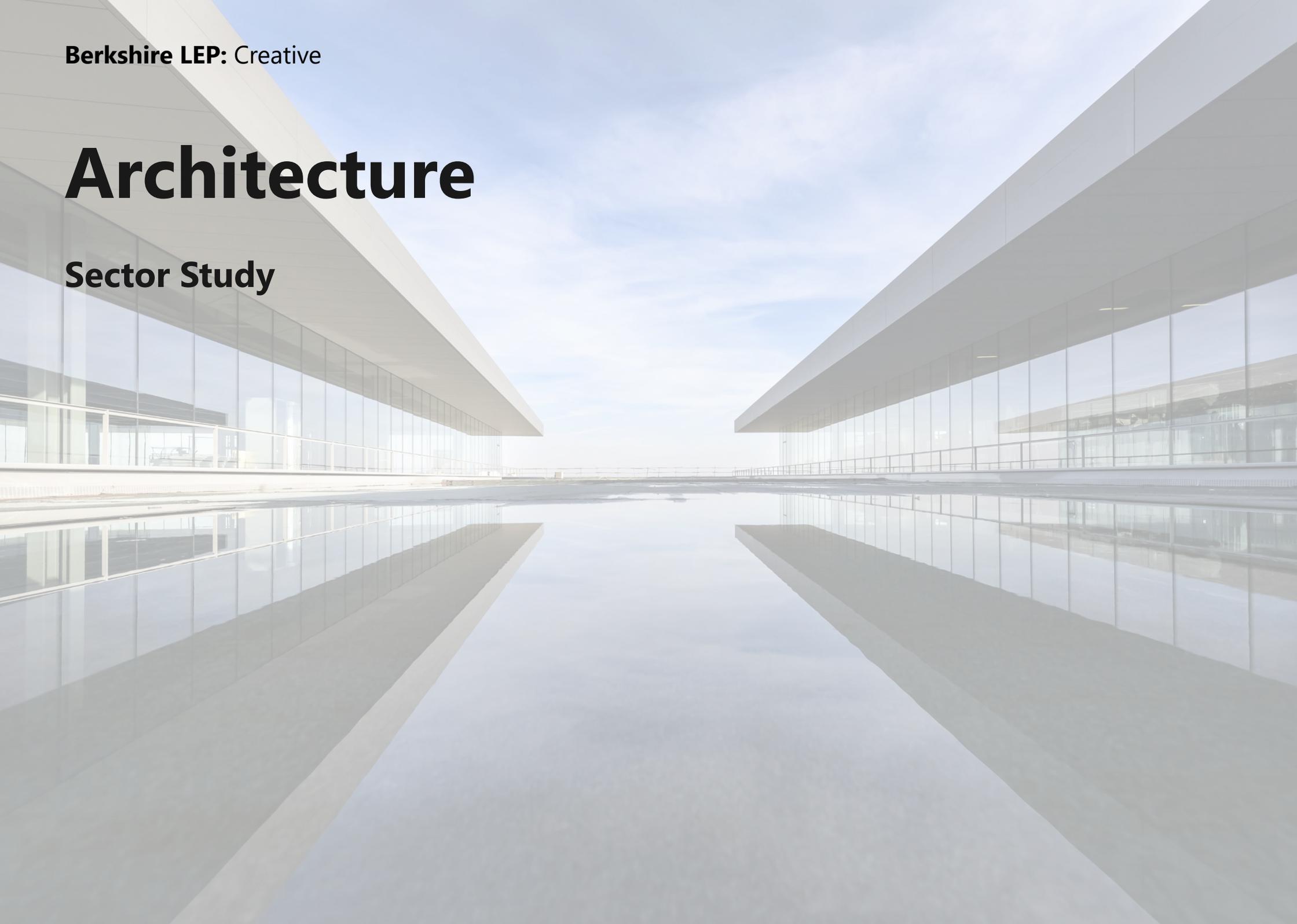
Among the top companies posting jobs, Ad Warrior LTD leads with 217 unique postings, followed by Ipsos and TalentSpa, with the numbers of 142 and 84.

In last five years, there was a peak in May 2023 with 421 postings. This demand decreases towards October 2023, stabilizing at 172 postings.

Berkshire LEP: Creative

Architecture

Sector Study



Architecture

Is the art and science of designing buildings and other physical structures. It involves the creation of spatial environments that are both functional and aesthetically pleasing. Architects use their creativity and technical knowledge to design structures that meet the specific needs of clients and users. Through thoughtful design, architecture has the power to reflect and influence culture, history, and identity, making it a fundamental aspect of our built environment and everyday lives.

Architecture in Berkshire¹

The architecture sector in 2019 contributed £56million to earnings, which is 0.32% of the total earnings of Berkshire. Capital income from the architecture industry was £14million representing 0.08% of the total capital income in Berkshire. Lastly, the Total Gross Value Added (GVA) by the architecture industry was £35million, making up 0.21% of the total GVA.

Architecture in the UK: An Overview²

The current situation of the architectural workload in the UK, as reported by the RIBA Future Workload Index for the third quarter of 2023, is pessimistic with the index at -11, indicating an overall expected contraction. This is attributed to rising interest rates and tighter consumer budgets, making project financing more challenging and expensive.

The UK Architecture Market: Growth and Trends

The future situation appears to remain challenging, particularly for smaller practices focusing on housing, which accounts for the majority of their work. The Private Housing Sector is performing the worst, with a significant drop in confidence levels. Looking at different sectors, the Commercial Sector has shown fluctuations,

while the Public Sector has been consistently negative, albeit with a slight uptick due to the urgent need for repairs in public buildings. The Community Sector is also struggling with a low workload index, reflecting ongoing financial pressures and an expectation of declining workloads since March 2022.

Architecture Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	235	220	15	0	0	1.21 m	1,500	0
Enterprise M3	545	500	35	10	0	16.8 m	2,000	2
OxLEP	225	205	20	0	0	2.52 m	900	1
Buckinghamshire	195	190	5	0	0	196 m	450	0

In 2023, in the architectural industry, Berkshire stands out with a total of 235 businesses. Dominated by micro-sized firms (220), it maintains a modest footprint of small businesses (15), but lacks medium and large enterprises.

Comparatively, Enterprise M3 shows a greater diversity of business sizes with 545 micro, 35 small, and 10 medium-sized businesses, reflecting a more mature market with growth potential.

It also has a higher turnover of £16.8 million and a larger workforce of 2,000 employees, indicating a more developed infrastructure supporting architectural services.

OxLEP mirrors Thames Valley Berkshire in the number of total businesses (225) and micro-sized firms (205), but with only one scale-up business and a smaller workforce (900 employees). However, OxLEP achieves a higher turnover (£252 million), which could imply a more focused or specialized market.

Buckinghamshire, with the smallest count of businesses (195) and only micro (190) and small (5) enterprises, has no scale-up businesses.

Major Companies in Architecture



**GUTTFIELD
ARCHITECTURE**

Guttfeld Architecture, founded in 2011, is an award-winning RIBA Chartered Architects Practice. The firm's base is Reading, Berkshire.

Its firm extends its services across the South East and London, specializing in creating beautiful, contemporary, and sustainable homes. They take pride in designing spaces that are not only visually appealing but also clever and energy-efficient, reflecting a deep commitment to good design and environmental consciousness.

The ethos of Guttfeld Architecture is rooted in a passion for unique and challenging projects, inspired by the natural beauty of the Thames Valley and the Chilterns where they are located. Their work is characterized by a sensitive approach to each site's specific beauty and challenges, not striving for size but for quality, aiming to make each home the very best it can be



For further information go to:
<https://guttfeldarchitecture.co.uk>

Network and Specialism

In Berkshire, the architecture industry's network and talent pool are closely tied to initiatives led by the Royal Institute of British Architects (RIBA) South/South East. This regional office represents 5,000 chartered architects, focusing on promoting the benefits of RIBA membership and practice accreditation. They deliver events for Continuing Professional Development and administer the RIBA Awards in the region. Additionally, they support student mentoring schemes and local RIBA branches that facilitate networking through meetups, local building tours, awards, and community activities. The Berkshire branch of RIBA, chaired by Jennifer Forakis, offers resources and local networking opportunities to foster talent and collaboration in the architectural community

Labour Market Information

Occupations

There is a 1.6% growth in architecture jobs in Berkshire from 2022 to 2023, slightly outpacing the national average decline of -0.1%. Average wages for architecture jobs in Berkshire are £36,607, which is 3% below the national average of £37,355.

Regionally, Slough shows the highest growth rate at 3.8%, while West Berkshire experiences a decline of 4.4%. The national industry age breakdown in 2018 suggests a relatively young workforce in the industry, with a significant proportion of jobs held by individuals in the 25-34 age (56.4%) bracket, indicating a pipeline of emerging talent in the architecture sector.

Newly Unique Postings Jobs

The architecture industry shows a total of 1,236 unique job postings between October 2022 and October 2023.

The top posting companies are led by John Wood Group with 518 unique postings, followed by Jacobs Engineering Group with 384.

The unique postings trend indicates a fluctuating market with a peak in June 2023 at 625 postings, followed by a decrease leading into October 2023. This could reflect seasonal variations in project starts or a response to economic conditions affecting the industry.

Berkshire LEP: Creative

Arts and Culture

Sector Study



Arts and Culture

Is categorized under cultural education, represents a vital sector focused on providing educational services and experiences in the realm of culture and the arts. This sector encompasses a diverse range of institutions and activities, from art schools and music instruction to heritage and cultural awareness programs. Its primary objective is to enrich and educate individuals and communities about various cultural aspects, promoting appreciation, understanding, and preservation of cultural heritage and artistic expression. Through its varied educational offerings, the sector plays a crucial role in nurturing creativity, fostering cultural diversity, and enhancing the societal value of arts and culture.

Arts and Culture in Berkshire¹

The arts and culture sector in 2019 contributed £1.5million to earnings. Capital income from the arts and culture industry was £765K. Lastly, the Total Gross Value Added (GVA) by the architecture industry was £2.2million.

Arts and Culture in the UK: An Overview²

- Art and culture contribute £10.6 billion to the UK economy - the UK has a creative economy worth £27bn and culture brings £850m to the UK, through tourism, each year.
- Arts and culture help tackle social injustice - theatres, museums, galleries , and libraries are the beating heart of our towns and cities. Not only do they bring prosperity, they bring communities together and make life worth living.
- Our creative industries are successful throughout the world - our leading cultural institutions are a calling card worldwide and have important trading links from the US or Germany to China and South Korea. Last year our National Portfolio Organisations earned £57m abroad.

Source: 1.EMSI, 2.[Arts Council England](#)

Arts and Culture Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	25	20	5	0	0	8.65 m	100	0
Enterprise M3	55	50	5	0	0	15.6 m	225	0
OxLEP	30	30	0	0	0	17.9 m	50	1
Buckinghamshire	25	20	5	0	0	6.1 m	125	0

In 2023, Berkshire region's Arts and Culture sector is marked by micro-sized businesses contributing £8.65 million in turnover with an employment of 100, indicating a closely-knit, efficient sector, yet showing potential for growth due to a lack of scale-ups.

Enterprise M3, with its 55 businesses, predominantly micro-sized, generates a higher turnover of £15.6 million and employs 225 individuals. This suggests a vibrant arts scene with substantial workforce, although, like Thames Valley, it lacks scale-ups.

OxLEP stands out uniquely, solely comprising micro businesses, yet leading in turnover at £17.9 million. With only 50 employees, it shows remarkable efficiency and specialization in its sector. It's also the only region exhibiting business growth with a scale-up.

Buckinghamshire's sector, similar in structure to Thames Valley Berkshire and Enterprise M3, generates a lower turnover of £6.1 million with 125 employees. The absence of scale-ups here too suggests a stable but undeveloped market.

Each LEP presents a diverse Arts and Culture landscape, from OxLEP's highly efficient micro-businesses to Enterprise M3's substantial economic and employment contributions, highlighting the uniqueness and growth potential within these regions.

Major Companies in Arts and Culture



Lots of Lovely Art" (LOLA) is an innovative company dedicated to nurturing creativity and cultural appreciation in children. Specializing in art education, LOLA offers a unique blend of hands-on art projects, cultural exploration, and historical insights, designed to engage young minds and foster a lifelong love for art. Their offerings range from interactive workshops to carefully curated art boxes, each crafted to inspire imagination and educate about different art forms and cultural histories. LOLA's mission is to make art accessible and enjoyable, helping to develop the next generation of creative thinkers and artists.



For further information go to:
<https://www.lotsoflovelyart.org>

Labour Market Information

Occupations

The sector employed approximately 90 individuals in 2022, with an average wage per job sitting at £16,824 in 2021. This average wage is notably below the national average wage for the sector, which is £17,817. The industry also saw a modest 1.1% growth from 2022 to 2023, slightly underperforming against the national growth rate of 2.0%.

Looking at specific areas within Berkshire, the most significant growth is seen in Slough, with a 6.6% increase in jobs from 2022 to 2023. In contrast, West Berkshire experienced a decrease in jobs by 2.9% over the same period. Reading and Bracknell Forest show more stability with slight growth rates of 2.5% and 1.5%, respectively.

Nationally, the industry's workforce is predominantly within the 25-34 age range, representing 29.6% of the jobs in 2018. The distribution indicates a relatively young workforce, with those aged 16-24 and 45-54 also making up significant portions of the industry at 21.0% and 25.1%, respectively.

Crafts¹

Encompasses the manufacturing of costume or imitation jewellery, including products like rings, bracelets, necklaces, and similar articles crafted from base metals coated with precious metals, as well as jewellery featuring imitation stones such as faux gems, imitation diamonds, and others. Additionally, it covers the production of metal watch bands, excluding those made from precious metals.

Crafts in Berkshire²

The crafts sector in 2019 contributed £1.8million to earnings. The Total Gross Value Added (GVA) by the crafts industry was also £1.8million.

Crafts in UK³: an overview

As of 2019, the craft market in the UK has seen a significant surge in interest, with 73% of UK adults having purchased craft items, leading to the sale of almost 25 million handcrafted objects. This market has attracted a diverse range of consumers, notably with nearly a third of buyers being under the age of 35, making them the largest demographic of craft consumers today. The crafts market has contributed significantly to the UK economy, with a reported generation of over £3 billion in 2020.

The UK Crafts Market: Growth and Trends

The UK craft market is maturing and is influenced by several wider trends likely to accelerate post-pandemic. These include the rise of e-commerce, a growing preference for investment in quality and sustainable items over disposable objects, and a general interest in supporting small businesses.

The Crafts Council anticipates further growth in the appreciation and consumption of UK crafts, emphasizing the need for interventions to expand the market. This includes further investment in retail finance mechanisms like Own Art, which provides interest-free credit for higher-value purchases, encouraging deeper engagement from existing buyers and cultivating their knowledge and connoisseurship in crafts.

Source: 1. [UNSD](#), 2. [EMSI](#) 3. [Creative United](#)

Berkshire LEP: Creative - Crafts

Crafts Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	15	15	0	0	0	30.4 m	75	0
Enterprise M3	30	30	0	0	0	No Data	50	0
OxLEP	15	15	0	0	0	No Data	15	0
Buckinghamshire	5	5	0	0	0	No Data	10	0

In 2023, Berkshire stands out prominently within the crafts sector. It is home to 15 businesses, all of which are micro-sized. Despite the small size of these businesses, they collectively generate a significant turnover of £30.4 million, which is remarkable and suggests high-value products or efficient business models. The employment figure stands at 75. However, the absence of scale-ups suggests that while the sector is currently successful, there may be untapped potential for growth and expansion.

Enterprise M3 presents a different scenario. With 30 businesses, all micro-sized, it has a larger business count than Thames Valley Berkshire. Unfortunately, turnover data is not available. The employment figure here is 50, smaller relative to its number of businesses compared to Thames Valley Berkshire.

OxLEP has a smaller presence in the crafts sector, with 15 micro-sized businesses. Again, turnover data is not available, but with only 15 employees. The scale of operations might be smaller, or the businesses could be focusing on niche, possibly high-value crafts.

Buckinghamshire has the smallest crafts sector among the regions, with only 5 micro-sized businesses. The lack of turnover data and a minimal employment figure of 10 suggest a very small-scale operation, possibly with highly specialized or artisanal focus.

Source: 1. [NOMS](#) 2. Beauhurst

Major Companies in Crafts



Taylor & Co is a distinctive and independent jewellery boutique,

renowned for its unique approach to jewellery crafting and sales. Founded by Mike Taylor, a master goldsmith with over 40 years of experience, the company was established with a commitment to affordability and quality in handmade and bespoke designer jewellery.

The company distinguishes itself by offering a boutique experience that brings a touch of Bond Street elegance to the home counties.

Taylor & Co's team, composed of talented master goldsmiths and watchmakers, specializes in creating bespoke jewellery, including engagement and wedding rings. The company prides itself on its personalized service, offering one-on-one appointments with their skilled team of jewellers and master goldsmiths to ensure each piece is tailored to the client's preferences and needs.

In summary, Taylor & Co Master Goldsmiths stands out in the Berkshire jewellery market for its blend of traditional craftsmanship, modern design, and personalized service, all underpinned by the founder's extensive experience and commitment to quality.



For further information go to:
<https://mastergoldsmiths.co.uk>

Labour Market Information

Occupations

The industry has experienced significant growth, with an 8.3% increase in jobs from 2022 to 2023, substantially outperforming the national average job growth rate of 1.3% for the same period. Employment stands at 126 jobs in 2022.

Furthermore, average wages per job in 2021 are £27,549, which is higher than the national average of £25,569, indicating a strong wage performance in this industry.

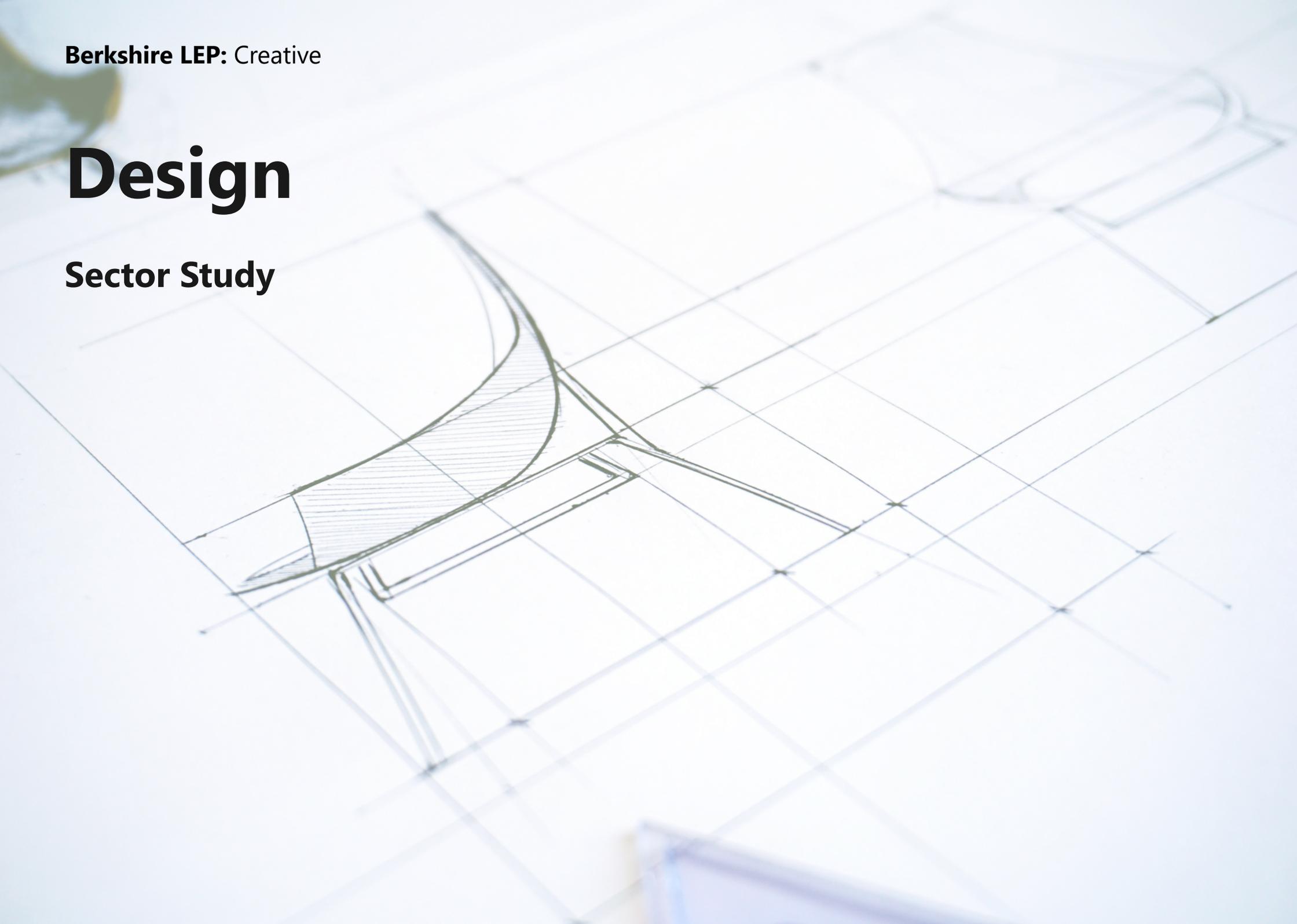
Regionally, Bracknell Forest leads with a 7.7% increase in jobs. Other areas such as Reading and Slough have not seen any change, indicating a concentration of industry growth in specific areas.

The age breakdown of the national industry workforce shows a significant concentration of workers in the 35-44 age group, which constitutes 40.8% of the jobs in 2018. The data indicates a mature workforce with substantial experience in the industry. The relatively lower representation of younger age groups, with 16-24 at 8.9% and 25-34 at 17%, might point to potential challenges in attracting new and young talent to the industry. Ensuring the transfer of skills and industry knowledge to younger generations may be an area for strategic focus.

Berkshire LEP: Creative

Design

Sector Study



Design¹

Encompasses a diverse range of design-related activities. It includes fashion design, which covers the creation of designs for textiles, wearing apparel, shoes, and items related to furniture and interior decoration, as well as other fashion and personal or household goods.

Additionally, it involves industrial design, focusing on the development of designs and specifications that optimize the use, value, and appearance of products. This process considers the selection of materials, construction, mechanism, shape, color, and surface finishes, taking into account human characteristics and needs, safety, market appeal, and efficiency in production, distribution, use, and maintenance.

Design in Berkshire²

The design sector in 2019 contributed £28.3million to earnings. Capital income from the design industry was £31.6 million. Lastly, the Total Gross Value Added (GVA) by the design industry was £66.2 million.

Design in the UK: An Overview³

The design economy significantly impacts the UK, contributing £97.4bn to the GVA in 2019, equivalent to the hospitality and real estate sectors combined. With a growth rate double that of the overall economy from 2010 to 2019, design has cemented its economic importance. It employed 1.97 million people in 2020, with 1.62 million in design roles, permeating sectors beyond its traditional boundaries. Despite this, certain sub-sectors like craft and clothing have seen GVA contractions, while employment in design grew by 4% from 2019 to 2020, demonstrating resilience amid varied sectoral performance during the pandemic.

The UK Design Market: Growth and Trends

The future of the UK design economy hinges on embracing sustainability and equity, essential for post-pandemic recovery. While the industry has shown resilience, with some sectors thriving through COVID-19,

others, particularly multidisciplinary design, face challenges. The increasing role of design in diverse industries highlights its potential as a catalyst for green growth and social equity. Moving forward, strategic support for design can drive responsible innovation, balancing economic gains with positive outcomes for society and the environment. Such an approach ensures the sector's growth aligns with broader goals of sustainability and inclusivity in the UK economy.

Source: 1. [SIC CODES](#), 2. EMSI, 3. [Design Council](#).

Berkshire LEP: Creative - Design

Design Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	415	395	20	0	0	221 m	800	0
Enterprise M3	870	840	30	0	0	43.2 m	1,500	3
OxLEP	315	300	15	0	0	1.42 m	600	0
Buckinghamshire	300	290	10	0	0	225 m	500	2

In 2023, Berkshire stands out with a large number of design businesses, totaling 415, predominantly micro-sized (95%). The turnover is impressive at £221 million, indicating a strong economic impact from these businesses. The employment figure stands at 800. Despite the sector's size and economic output, there are no scale-ups, indicating a stable but potentially static market.

Enterprise M3 has an even larger presence with 870 businesses, again mostly micro-sized (97%). However, its turnover is lower at £43.2 million, which is intriguing given the larger number of businesses compared to Thames Valley Berkshire. It employs 1,500 individuals, which is the highest among these regions and suggests a more significant employment impact. The presence of 3 scale-ups in this area is a positive indicator of growth and dynamism within the design sector.

OxLEP shows a moderate presence in the design sector with 315 businesses, with 95% being micro-sized. The turnover here is £1.42 million, which is relatively low compared to the number of businesses and indicates smaller-scale operations or less profitable business models. The employment figure stands at 600, suggesting a moderate level of job creation. Like Thames Valley Berkshire, the absence of scale-ups in OxLEP points to a need for growth stimulation.

Buckinghamshire has a strong design industry presence with 300 businesses, almost all micro-sized. Despite the smaller number of businesses compared to Thames Valley Berkshire and Enterprise M3, its turnover is remarkably high at £225 million, suggesting highly profitable operations or high-value services. It employs 500 individuals. The presence of 2 scale-ups suggests an evolving and growing sector.

Source: 1. [NOMS](#) 2. Beauhurst

Major Companies in Design



OMM is an independent creative digital agency based in UK and Amsterdam,

specializing in creating experiences that help consumers engage with brands. They focus on developing new technologies for breakthrough innovation and crafting compelling content. OMM has worked on various projects, including those for Nike, emphasizing their expertise in experiential projects. The agency has expanded with a successful first year in Amsterdam, ready for further growth. They are recognized as an official augmented reality partner and work with a talented team on local and international projects.



For further information go to:
<https://www.omm.agency>



naturebureau

NatureBureau, an ecological and design consultancy based in the UK, merges ecological knowledge with creative design. They offer specialized services in graphic design, print management, and environmental and wildlife publishing. Notably, NatureBureau has its acclaimed publishing imprint, Pisces Publications, featuring a diverse range of titles. Their work in design is characterized by a deep understanding of ecology and biodiversity, ensuring that their publications and design projects not only inform but also engage and inspire a wide audience.



For further information go to:
<https://www.naturebureau.co.uk>

Labour Market Information

Occupations

The design occupation shows a positive trend with jobs numbering at 983 in 2022 and a growth rate of 1.3% projected into 2023. This growth outpaces the national average of 0.7%. Despite this upward trend in job opportunities, there is a noticeable gap in wages. The average wages per job in 2021 for the region were £29,462, which is below the national average of £35,563.

Looking at specific regions, Bracknell Forest stands out with a significant increase, where jobs rose from 164 to 172, marking a 5.2% growth. In contrast, West Berkshire and Windsor and Maidenhead show only a marginal increase. Reading, Slough and Wokingham presents a decline in design jobs.

The national industry age breakdown as of 2018 shows a youthful skew in the design sector. The largest segment is the 25-34 age group, accounting for 37.4% of the workforce. The 16-24 age group also has a significant representation at 14.9%. The 35-44 and 45-54 age groups represent 22.1% and 14.9% respectively.

Newly Unique Postings Jobs

Across the year, 1,055 unique postings were recorded. With 317 employers actively competing for talent within a pool of 13,525 total employers.

The top posting companies are led by Project People with 42 unique postings, followed by Vodafone with 33.

In 2023, the design industry has shown a promising uptick in unique job postings. Starting the year with 152 unique postings in January, the industry saw a peak in July with 288 postings.

Source: EMSI

Berkshire LEP: Creative

Game

Sector Study



Game

denotes the vibrant sector of game publishing, where companies bring to market diverse gaming experiences for PCs, consoles, and mobile devices. These publishers are central to the gaming industry, managing everything from funding development to marketing and distribution. As technological innovators and cultural trendsetters, they navigate a fast-paced, ever-evolving digital landscape to deliver engaging content that captivates a global audience, solidifying games as a cornerstone of modern entertainment..

Game in Berkshire¹

The game sector in 2019 contributed £5.6million to earnings. Capital income from the game industry was £10.7 million. Lastly, the Total Gross Value Added (GVA) by the game industry was £16.3 million.

Game in the UK: An Overview²

The UK games industry has demonstrated resilience and growth, achieving a record £7.16 billion market value in 2021, driven by a 17.4% increase in game hardware sales. With console hardware sales up by nearly a third and a significant surge in VR hardware sales, the industry has capitalized on technological advancements and a robust consumer appetite for immersive gaming experiences. This growth is a testament to the industry's adaptability and innovation in meeting evolving consumer demands.

The UK Game Market: Growth and Trends³

The UK games market is poised to maintain its growth trajectory, propelled by technological innovation and evolving consumer behaviors. With a rebound in digital game sales and a continued preference for hybrid gaming experiences. The sustained interest in mobile gaming and the integration of games into broader culture suggest a robust future for the industry.

With a drastic shift from office to home settings after pandemic. The future points towards flexible work, with 90% preferring hybrid or remote arrangements.

Source: 1.EMSI, 2. [UKIE](#)

Berkshire LEP: Creative - Game

Game Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	5	5	0	0	0	No Data	15	0
Enterprise M3	15	15	0	0	0	55.3 m	75	0
OxLEP	5	5	0	0	0	128 m	35	0
Buckinghamshire	5	5	0	0	0	7.4 k	15	0

In 2023, Berkshire has a small presence in the gaming sector, with all 5 businesses being micro-sized. While turnover data is not available, the employment of 15 individuals.

Enterprise M3 shows a more substantial engagement in the gaming industry with 15 businesses, all micro-sized. However, it stands out with a significant turnover of £55.3 million, which is notably high for the number of businesses and their size. With 75 employees, it indicates efficient operations and possibly high-value gaming products or services.

OxLEP is unique with its considerably high turnover of £128 million from just 5 micro-sized businesses. This exceptionally high turnover, combined with a relatively small workforce of 35, suggests highly lucrative or innovative gaming operations, possibly involving cutting-edge technologies or high-demand gaming products.

Buckinghamshire also has a modest gaming sector with 5 micro-sized businesses. However, the turnover is markedly low at £7.4k, and with an employment figure of 15, it suggests very small-scale operations, possibly focusing on niche or emerging areas in gaming.

Source: 1. [NOMS](#) 2. Beauhurst

Labour Market Information

Occupations

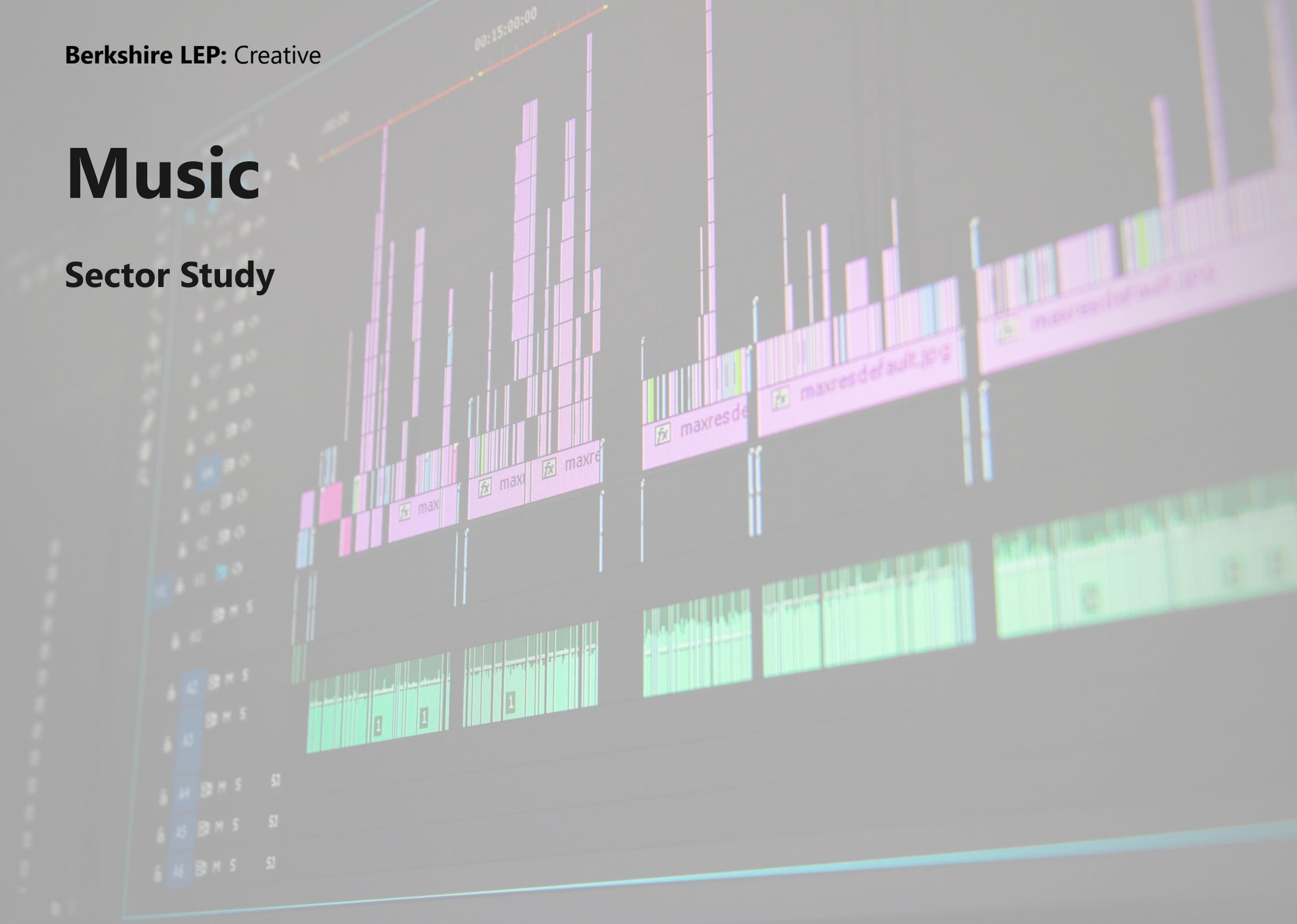
The Berkshire's computer game publishing industry experienced a decrease of 8.0% in job numbers, from 88 in 2022 to a projected lower figure in 2023, despite offering wages 41% above the national average. This decline is concentrated in Windsor and Maidenhead, which mirrors the regional trend with a 7.9% reduction in jobs. Despite the industry's challenges, average wages remain slightly higher than the national average for this sector, suggesting that while there may be fewer positions available, the value of each role remains strong.

The UK games industry workforce has more younger people working in it than the overall UK workforce. The 13% of people working in games who are 25 or younger can be compared with a figure of 10% in the workforce, while the total of 61% of people working in games who are 35 or younger can be compared with 33% of people in the overall workforce. Similarly, we can compare the 4% of people working in games who are 51 or older with 32% of people in the overall workforce who are 50 or older¹⁰. While the UK games industry workforce is younger than the overall workforce, it has aged compared to the 2020 census. In this census's fieldwork, 61% of people responded that they were aged 35 or younger, a decrease from 66% two years earlier.

Berkshire LEP: Creative

Music

Sector Study



Music

The music industry is a multifaceted world where artistry meets commerce, comprising songwriters, performers, live events, recordings, and the digital marketplace. It is an ever-evolving landscape, adapting to technological advancements and shifting consumer behaviors. From the vinyl records to streaming services, the industry has been a key cultural and economic force, fostering creativity and innovation. At its heart, the music industry is about the creation, distribution, and consumption of music in all its forms, connecting artists with audiences worldwide and continuously shaping the soundtrack of our lives.

Music in Berkshire²

The music sector in 2019 contributed £1.5million to earnings. Capital income from the music industry was £5.2 million. Lastly, the Total Gross Value Added (GVA) by the music industry was £6.7 million.

Music in the UK: An Overview³

The UK music industry contributed £6.7 billion to the economy in terms of GVA in 2022, with exports exceeding £4 billion and employment figures reaching 210,000. This resurgence is attributed to the return of live music and international touring, which had a direct positive impact on GVA and exports. Recorded and publishing-related revenues continued to ascend, even as the industry rebounded from the COVID-19 pandemic. Yet, despite these promising figures, smaller venues, independent festivals, and music creators face financial pressures, with Brexit posing particular challenges for touring artists.

The UK Music Market: Growth and Trends

The UK music industry's revenue streams are diversifying, with growth seen in both vinyl and streaming services, where subscription and ad-supported services have seen increases.

Video streaming platforms like YouTube and TikTok have also expanded their contribution to the industry's revenue. There is optimism that price increases in streaming services will further enhance the value of the recorded music market in 2023. Non-traditional sources such as audio-visual projects and music merchandise have seen a strong rebound, indicative of a trend towards broadening revenue bases beyond traditional sales and streams,

Source: 1.EMSI, 2. [UK MUSIC](#)

Berkshire LEP: Creative - Music

Music Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	40	40	0	0	0	5.4 m	175	0
Enterprise M3	125	125	0	0	0	1.25 m	300	0
OxLEP	50	50	0	0	0	312 k	125	0
Buckinghamshire	60	60	10	0	0	5.4 m	175	0

In 2023, Berkshire has a modest presence in the music industry with 40 businesses, all micro-sized. The turnover in this region is £5.4 million. With 175 employees, the sector seems to support a considerable workforce, suggesting that these micro-sized businesses are actively contributing to the local job market.

Enterprise M3 presents a more extensive engagement in the music industry, with 125 micro-sized businesses. Surprisingly, the turnover is lower at £1.25 million, despite having a larger number of businesses compared to Thames Valley Berkshire. The employment figure stands at 300, the highest among the regions, indicating a significant employment impact in the local music scene.

OxLEP has a moderate presence with 50 micro-sized businesses in the music industry. The turnover is relatively low at £312k, which, alongside an employment of 125, might indicate smaller scale or emerging businesses, or possibly a focus on niche areas within the music industry.

Buckinghamshire shows a dynamic sector with 60 businesses, all micro-sized. Its turnover matches Thames Valley Berkshire at £5.4 million, which is noteworthy for the number of businesses. An employment figure of 175 suggests a robust contribution to the local job market, similar to Thames Valley Berkshire. Like the other regions, it lacks scale-ups.

Source: 1. [NOMS](#) 2. Beauhurst

Labour Market Information

Occupations

The music sector in Berkshire showed a job increase of 5.1% from 2022 to 2023, surpassing the national average growth of 3.2%. Despite this growth, the average wages in the industry were £21,089, considerably lower than the national average wage. Regionally, all areas experienced growth, particularly Bracknell Forest and Reading, with a 6.3% increase in jobs.

The workforce is predominantly young, with those aged 25-34 making up 44.4% of the industry, suggesting a vibrant and dynamic sector that may continue to see growth and demand for young talent.

Newly Unique Postings Jobs

Across the year, 112 unique postings were recorded. With 44 employers actively competing for talent within a pool of 13,525 total employers.

The top posting companies are led by NHS with 13 unique postings, followed by Academics with 7.

In 2023, Berkshire's music industry job postings saw a gradual rise, with a jump to 43 unique postings in July, indicating a robust period likely tied to an increased need for summer event staff.

Berkshire LEP: Creative

Publishing

Sector Study



Publishing

Encompassing traditional book and newspaper publishing to cutting-edge software publication, represents a dynamic fusion of culture, information, and technology. From the literary creativity in book publishing (5811) and the critical role of newspapers (5813) in journalism, to the innovation-driven realms of software (5829) and specialized journals (5814), this sector is pivotal in shaping societal discourse and technological advancement. It seamlessly blends the preservation of knowledge and the pursuit of new frontiers, reflecting an ever-evolving landscape where stories, data, and digital advancements converge to inform, entertain, and innovate.

Publishing in Berkshire¹

The publishing sector in 2019 contributed £57.4million to earnings. Capital income from the publishing industry was £548.3 million. Lastly, the Total Gross Value Added (GVA) by the publishing industry was £607 million.

Publishing in the UK: An Overview²

The UK publishing industry has a turnover of £6 billion, with export income accounting for almost 60 per cent of revenues according to the International Publishers Association. The publishing industry directly employs 29,000 people in the UK and supports more than 70,000 jobs.

The UK Publishing Market: Growth and Trends

Publishing jobs include developing, commissioning or acquiring content (online or offline), editing, graphic design, photography, production work (including video and Podcasts), website/email creation, and uploading and marketing/distribution of offline and online content. A range of management and administration jobs also support the sector.

For suppliers, online and offline opportunities exist in each of the above areas to work for publishing companies and other businesses. Publishers can commission content themselves or be approached by suppliers or producers for publishing work - in return for a fee. Suppliers and producers can publish their own works and receive full payment for doing so, provided there is sufficient demand.

Source: 1.EMSI, 2. [Ni Business Info](#)

Publishing Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	180	160	15	5	0	1.29 b	1,650	3
Enterprise M3	345	310	35	0	0	1.09 b	1,925	0
OxLEP	280	250	30	0	0	401 m	5880	5
Buckinghamshire	145	130	15	0	0	154 m	675	0

In 2023, Berkshire has a well-established presence in the publishing sector with 180 businesses. Its composition primarily includes micro (89%) and small businesses (8%), with a notable presence of medium-sized businesses (3%). The turnover is exceptionally high at £1.29 billion, indicating a significant economic impact in the region. The employment of 1,650 individuals suggests a considerable contribution to the job market. The presence of 3 scale-ups is indicative of a dynamic and evolving sector.

Enterprise M3 presents a more extensive engagement with 345 businesses, predominantly micro-sized (90%) and a smaller proportion of small businesses (10%). Despite having more businesses than Berkshire, its turnover is slightly lower at £1.09 billion. However, it employs the most individuals (1,925) among the regions, suggesting a major role in job creation.

OxLEP shows a strong publishing industry with 280 businesses, mainly micro (89%) and small (11%). Its turnover is £401 million, which is substantial but lower compared to the other two regions. However, OxLEP stands out with a significantly high employment figure of 5,880, indicating a major employment sector within the region. The presence of 5 scale-ups suggests a particularly dynamic and growth-oriented industry.

Buckinghamshire has a modest yet substantial publishing sector with 145 businesses, predominantly micro-sized (90%) and a small segment of small businesses (10%). The turnover is £154 million, and it employs 675 individuals, suggesting a smaller scale operation compared to other regions. The absence of scale-ups in Buckinghamshire points to a stable sector.

Source: 1. [NOMS](#) 2. Beauhurst

Major Companies in Publishing



Lantana Publishing, established in 2014 by Dr. Alice Curry, is a Berkshire-based children's book publisher renowned for its dedication to inclusivity and diversity. With a mission to represent under-represented groups, Lantana's books celebrate varied cultures, ethnicities, genders, and abilities. Their award-winning catalog includes beautifully illustrated picture books and engaging fiction for young readers, all reflecting their commitment to social equality and environmental sustainability. Lantana prints its books using plant-based inks on sustainably sourced paper, highlighting their ecological responsibility. Their unique approach to publishing emphasizes the importance of every child seeing themselves in the stories they read.



For further information go to:
<https://www.lantanapublishing.com/>



The Yattendon Group, a British entity owned by the Iliffe family, holds a prominent position in the publishing industry. With operations extending through the UK, Europe, Canada, and North America, the group has a significant impact on local media through its subsidiary, Iliffe Media. This division is at the heart of the group's publishing activities, producing millions of newspapers each week and managing a portfolio of local newspapers, magazines, and radio stations. The Yattendon Group is known for its commitment to local journalism and community engagement, balancing traditional values with modern publishing techniques. Their strategic approach in the publishing sector emphasizes quality content, support for local journalism, and a strong community presence, underpinning their broader business philosophy of long-term value creation in competitive markets.



For further information go to:
<https://www.yattendongroup.co.uk/>

Labour Market Information

Occupations

In 2022, the publishing industry reported 1650 jobs, but this figure dipped by 6.5% the following year. This decline sharply contrasts with the national average, which saw only a 0.4% change. Despite the job reduction, average wages remained high at £43,148, surpassing the national average by nearly £4,000.

Regionally, only Bracknell Forest experienced job growth (+8.2%). In contrast, significant declines occurred in West Berkshire, Reading, Slough, Windsor and Maidenhead, and Wokingham, with Slough and Windsor and Maidenhead facing the steepest drops at 13.9% and 18.3%, respectively. The workforce's age distribution skewed towards the 25-54 age bracket, indicating a mature workforce with fewer younger or older workers. The data suggests a need for strategic responses to mitigate job losses and support the sector's sustainability.

Newly Unique Postings Jobs

The job market from October 2022 to October 2023 showcased a total of 360 unique roles. The competition among employers was notable, with 65 employers actively competing for talent within a pool of 13,525 total employers.

The unique postings trend revealed a mid-year surge, especially in June 2023 with the highest postings at 83, suggesting a seasonal or cyclical peak in hiring. This trend declined towards the year's end, with November postings at 58.

In this period, sectors such as healthcare, language services, and telecommunications were prominently active in job listings, led by companies like Entrust with 50 postings, Caterlink with 27 postings.

Source: EMSI

Berkshire LEP: Creative

TV & Film

Sector Study



TV & Film

The TV & Film industry is a tapestry of creative and technical endeavors encompassing production, post-production, distribution, and projection of films and television programs, alongside radio and TV broadcasting. This sector thrives on storytelling and technology, connecting content creators with global audiences through cinemas, airwaves, and digital platforms. Its diverse operations fuel cultural experiences, from the making of cinematic works to broadcasting radio waves and TV signals, defining our entertainment and information landscapes.

TV & Film in Berkshire²

The TV & Film sector in 2019 contributed £25million to earnings. Capital income from the TV & Film industry was £51.5 million. Lastly, the Total Gross Value Added (GVA) by the TV & Film industry was £76.2 million.

TV & Film in the UK: An Overview²

In 2022, the UK's film and high-end television (HETV) industry reached a historic high with a £6.27 billion production spend. High-end TV production contributed £4.30 billion, while feature films added £1.97 billion. The UK continues to be a global center for film and TV production, driven by inward investment in films and HETV shows, despite a downturn in independent UK filmmaking spend

The UK TV & Film Market: Growth and Trends

The UK film and HETV sector is seeing increasing investment from streaming platforms in single long-form productions. The trends point to a growing recovery in cinema attendance post-pandemic, though still lagging behind pre-pandemic levels, and a continued rise in UK spend on inward investment and co-productions, positioning the UK as a competitive global production hub.

Famous Productions Made in the Berkshire³

Downton Abbey, Snow White, The Office, Killing Eve, Mr Bean, The Crown, Sherlock Holmes, The Witcher, Midsomer Murders, The Wrong Mans, Inside Man, Bridgerton, Dracula, The Boys in the Board, The Lord of the Rings: The Rings of Power (season 2)

Source: 1. EMSI, 2. [BFI](#), 3. [Berkshire Live](#)

Berkshire LEP: Creative - TV & Film

TV & Film Business in Different LEP

	Total	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)	Total Turnover	Employees	Number of Scale Ups
Thames Valley Berkshire	555	525	30	0	0	301 m	3,095	1
Enterprise M3	1,165	1,150	15	0	0	1.44 b	4,100	3
OxLEP	360	355	5	0	0	5.05 m	1,155	1
Buckinghamshire	655	635	15	5	0	880 m	3,535	2

In 2023, Berkshire shows a robust presence in the TV & Film industry with 555 businesses, mostly micro-sized (95%), along with a small proportion of small businesses (5%). This LEP stands out with a turnover of £301 million, reflecting a significant economic contribution. An employment figure of 3,095 indicates a substantial workforce in this sector. The presence of one scale-up points to some growth potential, albeit limited compared to the overall size of the sector.

Enterprise M3 demonstrates a more extensive engagement, hosting 1,165 businesses, again predominantly micro-sized (99%). Its turnover is an impressive £1.44 billion, the highest among the regions. With the highest employment figure of 4,100, Enterprise M3 clearly plays a pivotal role in job creation within the TV & Film sector. Additionally, the presence of 3 scale-ups in this region indicates a dynamic and evolving industry.

OxLEP has a considerable presence with 360 businesses, nearly all of which are micro-sized (99%). However, the turnover is relatively low at £5.05 million, which, when compared with the number of businesses and employees (1,155), suggests smaller-scale operations or potentially niche areas within the TV & Film industry.

Buckinghamshire also shows a significant presence with 655 businesses, primarily micro-sized (97%). The turnover here is substantial at £880 million, indicating a thriving TV & Film industry. With an employment of 3,535, Buckinghamshire contributes considerably to job creation in this sector.

Source: 1. [NOMS](#) 2. Beauhurst

Major Companies in TV & Film



Shinfield Studios, established in 2021, is a state-of-the-art, purpose-built studio facility located near Reading in Berkshire. It's part of the Thames Valley Science Park within Wokingham Borough, offering excellent transport connections. Currently, the studio has completed its first two phases, including nine stages, workshops, and offices. The ongoing construction of Phase 3 will add more stages, with full completion expected by Spring 2024. Upon completion, Shinfield Studios will be one of the UK's largest studio complexes, with 18 sound stages, contemporary offices, and a post-production complex. It's owned and operated by Shadowbox Studios, which has produced blockbusters like "Jumanji: The Next Level" and "Jungle Cruise" at its Atlanta campus.

 For further information go to:
<https://www.shinfieldstudios.com/>



BRAY FILM STUDIOS

Bray Studios in Berkshire is renowned for its significant contributions to film and TV production.

Established in 1951, it became the home of Hammer Film Productions from 1952 to 1966. The studio is celebrated for its work on iconic films such as "The Imaginarium of Doctor Parnassus," "Mutant Chronicles," "The Dark," "Ali G Indahouse," and the horror classic "Alien." Additionally, Bray Studios was the filming location for the cult classic "The Rocky Horror Picture Show." The studio has also been instrumental in producing TV series like "Red Dwarf," "Inspector Morse," and "Doctor Who."

 For further information go to:
<http://www.braystudios.com/>

Major Companies in TV & Film



Winnersh Studios, nestled in Berkshire, UK, represents a modern leap in film and television production.

Designed to meet the high standards of today's entertainment industry, this state-of-the-art facility is equipped with advanced technology and versatile production spaces. While specific productions associated with Winnersh Studios are not extensively publicized, its establishment marks a significant milestone in expanding the UK's filming infrastructure. The studio serves as a testament to the region's dedication to fostering creative talent and providing top-tier resources for both independent and major studio projects. As part of Berkshire's thriving film and TV industry landscape, Winnersh Studios is set to become a hub for notable future productions, contributing significantly to the local and national creative sectors.



For further information go to:
<https://www.winnershfilmstudios.com/>



Dustoff Films is a documentary production company founded by former members of the British Combat Search and Rescue unit, MERT. Specializing in human stories around communities and the environment, they focus on conservation and protection of wild spaces. Known for their flexibility and willingness to work under harsh conditions, Dustoff Films creates impactful stories, exploring important contemporary issues. Their approach involves sourcing ideas actively and building a system to finance and produce significant stories for the current generation.



For further information go to:
<https://dustofffilms.com/>

Network and Collaboration

The Film and TV industry in Berkshire, particularly through initiatives like Screen Berkshire, exemplifies a thriving network and collaborative environment. This synergy is not just between production companies and studios but extends to educational institutions, local government, and various stakeholders in the media sector.

Integration with Local and International Entities
Berkshire's film and TV industry benefits from close ties with local and international entities. These connections are evident in partnerships involving major studios like Shinfield Studios, academic institutions such as the University of Reading, and production companies like Bedlam Film Productions. These collaborations foster a rich exchange of ideas, resources, and talent, essential for creative endeavors and technical innovation in filmmaking.

Screen Berkshire stands out as a pivotal platform facilitating these collaborations. As a connector, it brings together diverse industry players, from freelancers and small production houses to large studios and educational entities.

By organizing events and fostering a sense of community, Screen Berkshire plays a crucial role in ensuring that the local film and TV industry remains interconnected and dynamic.

Events like film festivals and workshops, often sponsored or supported by Screen Berkshire, provide invaluable networking opportunities. These gatherings are not just for showcasing work but also for industry professionals to meet, exchange ideas, and initiate collaborations. Such events are critical in maintaining a vibrant community where knowledge, skills, and resources are shared.

Support from Local Government and Educational Institutions

Local government in Berkshire, alongside educational institutions, provides significant support to the industry. This support ranges from funding initiatives to offering courses tailored to the needs of the film and TV sector. Such backing ensures that the industry has the necessary infrastructure and talent pool to thrive.

Source: [University of Reading](#)

Talent Support and Specialism

The Film and TV industry in Berkshire is not only known for its network and collaboration but also for its focus on talent support and specialism. This emphasis is critical in maintaining a high standard of production and fostering innovation within the industry.

Screen Berkshire, through its partnerships and initiatives, plays a central role in developing a diverse range of talent within the industry. By providing opportunities for people from all backgrounds to train and update their skills, it addresses the high demand for skilled crew in the film and TV sector. This approach is not only inclusive but also ensures a broad spectrum of perspectives and skills in the industry.

Institutions like the University of Reading contribute significantly to talent development. They offer specialized courses in film and television production, thereby creating a pipeline of well-trained and innovative professionals. These educational programs are designed to keep up with the evolving demands of the industry, ensuring that graduates are well-prepared to contribute effectively.

Investment in Training and Upskilling

Significant investments are made in training and upskilling individuals within the industry. This is evident in the funding and support provided for various training programs, workshops, and boot camps. Such initiatives are crucial in ensuring that the workforce remains at the cutting edge of film and TV production technology and techniques.

Specialization in Technical and Creative Aspects

The industry in Berkshire is marked by a specialization in both technical and creative aspects of film and TV production. This specialization is a result of the collaborative efforts of studios, educational institutions, and local government in nurturing a talent pool that is proficient in various facets of filmmaking, from special effects to storytelling.

Source: [University of Reading](#)

Labour Market Information

Occupations

Berkshire The TV and Film industry in 2022, the industry housed 1,100 jobs, which increased by 3.4% in 2023, surpassing the national growth rate of 2.2%. Despite this growth, the average wages in the industry stand at £25,359, which is significantly lower (61%) than the national average of £40,766.

Regionally, Bracknell Forest, Windsor and Maidenhead, and Wokingham experienced notable job increases, with Wokingham leading at 5.4%. However, there's been a slight decline in Reading and Slough, suggesting a shift or concentration of industry jobs to the surrounding areas.

The national age breakdown from 2018 indicates a youthful industry with the majority of jobs held by those aged 25-44 (57.6%). Yet, the underrepresentation of those 55 and older (8.3%) could imply a gap in experience or a trend towards youth-centric hiring practices.

Newly Unique Postings Jobs

The job market dynamics in Berkshire reflect both an active employment landscape and a competitive edge. There are 409 unique job postings in 2023.

A closer look at the unique postings trend reveals a fluctuating job market with seasonal peaks and troughs. Notably, the summer months, particularly July and August 2023, display a significant surge in job postings, with July peaking at 122 unique postings.

Top companies in the industry, such as Ultima and VGC Limited, show robust recruitment activity, with Ultima leading with 70 unique postings from October 2022 to October 2023. This indicates that key players are not only sustaining but possibly expanding their operations in the region.

Source: EMSI

Academic and Training

Development of Creative Skills and Infrastructure¹

Berkshire's commitment to creative education is exemplified by the establishment of the Creative Industries Skills Centre at Reading College. This center is dedicated to equipping students with the necessary skills for the creative sector, featuring state-of-the-art media and music studios. The comprehensive facilities provide a practical, hands-on approach to learning, enabling students to work with industry-standard equipment and software.

The initiative, backed by significant investment from the Berkshire LEP, not only enhances the learning experience but also serves as a magnet for talent, promoting innovation and collaboration within the creative industries. These efforts are critical in maintaining Berkshire's position as a hub for creative excellence and in attracting new talent to the region's thriving media and entertainment sector.

Building a Skilled Workforce for the Screen Industry²

In response to the burgeoning screen industry in Berkshire, the Berkshire Skills Hub, under the auspices of the British Film Institute, is a forward-thinking initiative designed to curtail the skills shortage in the local industry. This Skills Cluster is a strategic response, providing bespoke training opportunities, fostering diversity, and enhancing career development support. It stands as a testament to the collaborative spirit of the region, involving key players from the government to academia, such as the University of Reading. This concerted effort is expected to not only fill current gaps but also to prepare a workforce that is adaptable and ready for future challenges and innovations in the screen industry. It underscores the region's commitment to nurturing a vibrant, inclusive, and skilled community, ensuring Berkshire remains a key player in the global narrative of film and TV production.

Source: 1.[Activate Learning](#), 2.[University of Reading](#)

Connectivity is King

Access to London and the Globe

The transportation system in Berkshire, particularly in Reading, offers several advantages that enhance the region's connectivity and accessibility. Reading serves as the western terminus of the Elizabeth Line, providing efficient services through Central London. This connectivity extends to the London Underground network, with connections at London Paddington, Waterloo, Ealing Broadway, and Richmond.

Thames Valley Berkshire's close proximity to London and Heathrow Airport provides easy access to customers, studios and markets. Heathrow, the world's third busiest airport, provides access to 185 international destinations, including 23 cities in the US.

The local public transport in Reading is largely road-based, with a frequent bus network provided by Reading Buses and other operators. Since 2004, there has been significant investment in upgrading the main urban bus routes.

Reading's cycling infrastructure, including the OYBike bicycle sharing system and major cycle routes in Sustrans' National Cycle Network, further enhances the transport options available.

West Berkshire's revised Local Transport Plan (LTP4), covering 2024-2039, aligns with demographic changes and emerging transport needs. Key focuses include sustainability, accessibility, and decarbonization, supported by strategies for cycling, walking, and low-emission vehicles. The plan, informed by travel pattern analysis, addresses unique needs across Newbury and Thatcham, rural areas, villages, and the eastern district. It also considers strategic transport corridors. Public feedback is sought to refine the plan, with final strategy publication slated for spring 2024. Community input is crucial for shaping the final LTP and action plan, available for comment until 22 March 2023.

Source: [Berkshire LEP](#), [West Berkshire Council](#)

World-class Connectivity

Flight times from Heathrow Airport



Living in Berkshire

Rich History, culture and leisure.

Berkshire is home to an abundance of visitor attractions, sporting events and Michelin-star restaurants, along with the 'London Season' events of:

- Henley Royal Regatta
- Royal Ascot
- Royal Windsor Horse Show
- Cartier Queen's Cup at Guards Polo Club

Windsor Castle is the oldest and largest occupied castle in the world.

Nearby are national stadiums for rugby at Twickenham, cricket at Lords and football at Wembley.

Golf courses abound including international standard courses at Wentworth and Sunningdale.

Other attractions include Legoland Windsor, Reading music festival and nearby Thorpe Park and Chessington World of Adventures.

Attractive living environment

Berkshire is one of the few locations in the UK where it is possible to live and work in a picturesque setting but within easy reach of a world city, London. Over a third of Berkshire is designated an Area of Outstanding Natural Beauty, one of the highest concentrations in England.

Excellent education

For families, Berkshire is home to many excellent state and private schools, including the world renowned Eton College, Wellington College and St George's Ascot. Top rated state-funded schools include the Downs School and Charters School.

In addition, two international schools are located just outside Berkshire – ACS Egham in Surrey and the European School Culham in Oxfordshire.

Reading has the highest proportion of school pupils going on to Oxford or Cambridge University (6%) in the country.

"Set along side the rejuvenated waterways through Maidenhead new homes and commercial spaces will transform the area of the town and attract new businesses, residents and shoppers "

**- Tamra Booth,
Group Operations Director
at Shanly Homes**