Report to the Partnership for South Hampshire Overview and Scrutiny Committee

Date:	**3 December 2025**
Report of:	**Charles Freeman, PfSH Culture, Creative and Built Environment Lead Officer**
Subject:	**Update on PfSH support for the cultural and creative industries**

SUMMARY

This report provides an update for joint Committee on PfSH support for the cultural, creative industries and built environment industries. It covers:

- Progress in establishing the Hampshire and Solent Film Office
- Work Undertaken to Support the Creative Industries Skills Agenda
- The role Creative Network South is playing in helping the sector prepare for devolution.

A budget request of £15k is incorporated for the continued support of the cultural, creative industries and built environment workstream for 26/27.

RECOMMENDATIONS

It is recommended that the Overview and Scrutiny Committee:-

i) NOTES the contents of this report;

ii) NOTES that Joint Committee will be asked to:

(a) NOTE the contents of the report and the provision of PfSH support for the cultural and creative industries;

(b) ENDORSE the cultural and creative workstream priorities 2026/2027:

- **The Hampshire and Solent Film Agency** - to work with Portsmouth City Council to support FilmFixer in building a successful self-sustaining Film Agency to serve the area.
- **Skills for the Creative Economy** - to work with Hampshire Chamber of Commerce on the refresh of the Local Skills Improvement Plan to ensure the creative industry skills agenda continues to be progressed in the area.

- **Devolution** - to work with local authorities and cultural sector partners to develop thinking on the way the creative Sector can support the future priorities for the area;

(a) AGREES that a £15,000 budget be allocated for the provision of PfSH support for the cultural and creative industries in 2026-27. This work will be delivered by Creative Network South, which is hosted by Hampshire Chamber of Commerce; and

iii) CONSIDERS any comments to pass on to Joint Committee for its consideration.

PLEASE NOTE this report is a draft version of the PfSH Joint Committee report and is subject to change before being considered by the PfSH Joint Committee. The final report will be published ahead of the PfSH Joint Committee.

1. Background

1. In March 2025 Joint Committee agreed two priorities for the culture, creative Industries and built environment workstream for the year 2025-26.

- To support the establishment of a screen agency to cover the Solent Growth Board and Partnership for The South Hampshire Area.
- To work with Hampshire Chamber of Commerce to ensure that the creative industries skills agenda continues to be developed through the Local Skills Improvement Plan (LSIP) and its successor.

The provision of PfSH support is undertaken through Creative Network South (CNS), a sector group established by PfSH and Hosted by Hampshire Chamber of Commerce. CNS meets four times a year and functions both as a meeting place for those wishing to develop the creative economy in South Hampshire, and as a network of networks.

Networks supported by Creative Network South include:

- **Studio provider network south** - hosted by Making Space Havant. This network links artists' studios in the area.
- **CNS creative Industries Academic Research Network -** which has been facilitated by Professor Roy Hanney of Southampton Solent University. This network includes representatives from Southampton Solent University, University of Southampton, University of Portsmouth, and Bournemouth University.
- An **independent games developer network** facilitated by Annie Durwood of Antivenin Games.
- An Annual **Film Sector Cluster Meeting** hosted at Fareham College.
- **Ladies Wine and Design Southampton** - This is a network of early-stage designers both male and female facilitated by Jazzy Olive and Minnin Xu
- CNS has worked with RSA Southampton Hub lead, Fred Basset, to establish the **Creative Catalyst** which is a network of 250 commercial creative businesses based in the Hampshire and Solent area. Over the last year 1 000 creatives have attended their network meetings.
- CNS continues to support **Venturefest South**, to act as a festival of innovation and creativity for the area.

Additionally, CNS has worked with local authorities, and other partners in working to ensure the interests of the culture and creative sector are embedded within proposals for the establishment of the Hampshire and Solent Combined Authority.

2. The Hampshire and Solent Film Office

2.1 The Film Sector in the Solent and Hampshire Area, generates more than £700m GVA, (4% of total sector value in the UK) The sector supports 1500 businesses and 5000 jobs. 60% of the workforce freelance.

2.1 The Solent and Hampshire area offers a plentiful range of ideal locations for film makers. Opportunity therefore exists for the area to attract a bigger share of the £4.2 billion spent on film and high-end television production in the UK.

2.2 In March 2025, PfSH agreed to support a proposal to establish a film office to serve the Solent and South Hampshire area. This proposal had previously been agreed by the Solent Growth Partnership. The project aim being to increase film production activity in the area. During the summer Portsmouth City Council managed a procurement process on behalf of PfSH and the Solent Growth Partnership. Businesses were invited to set up a self-sustaining film location service. £60k was made available to the winning contractor to facilitate set-up costs.

2.3 In September FilmFixer were awarded the contract to establish the Hampshire and Solent Film Office. FilmFixer run similar services for many London boroughs and across the county of Suffolk. PfSH local authorities, alongside the Solent Growth Partnership have been invited to allow FilmFixer to act on their behalf to promote film locations in their area, and handle administration relating to the issue of permits.

2.4 FilmFixer will launch the Solent and Hampshire Film Office to the film production industry, at the Film Location Managers Conference Focus on the 8 and 9 December.

2.5 It is noted that a key to the success of the project, is to secure sign up from as many local authorities as possible. This is at zero cost to PfSH and the Solent Growth Partnership. Participating Authorities will however continue to receive fees for permits issued and locations used by production companies.

2.6 It is also proposed to invite non-PfSH Hampshire local authorities to join the agency. A share of receipts from production companies using locations in North Hampshire will be retained in an equalisation fund until these collectively match the contribution made by PfSH (£15k). This will ensure all local authorities will have made some contribution to the funding of the agency and benefit from its services on a fair basis. The authorities will not be asked to make any up-front contribution to gain membership.

2.7 Prior to procurement the project to establish the Film Agency, the project was managed by a steering group chaired by CNS. Following procurement, Portsmouth City Council are the contract holders with FilmFixer, on behalf of PfSH and the Solent Growth Partnership. The contract is for a three-year period, during which time it is envisaged that the Agency will become fully self-funding. The steering group is therefore being reformed as an advisory group which will have a membership reflecting the local authorities that decide to make use of the Agency.

2.8 It is noted that attracting high-end film and television productions to locations in the Hampshire and Solent area forms only one part of a strategy to develop the sector. Skills and talent development, and the showcasing of local work at festivals is also crucial. On 11 November Film North were invited to lead a discussion on how a film sector strategy could be developed in our area. The Local Skills Improvement Plan has identified the film and audio sector as an area of focus and, at time of writing, will be launching a skills report on the 1 December at Farnborough Studios.

3. Creative Industries and the Local Skills Improvement Plan (LSIP).

3.1 The Solent LSIP Identified the creative industries as one of its key sectors into which it commissioned a deep dive. The Chamber of Commerce has used Creative Network South (CNS) as a forum for discussion regarding the creative industries skills agenda. These discussions included:

- **Work with Tech Solent** - (a sister network serving the tech and digital sectors). This meeting identified a challenge in finding work placements for T Level students. This was not because businesses did not want to offer work experience opportunities, rather that, the logistics of managing placements within a micro digital or tech business responding to an irregular project-based workload make it hard for many to offer placements.

  In response to this conversation, Hampshire Chamber of Commerce is piloting an intermediate employment initiative with South Hampshire College Group. Through this program businesses are invited to offer students opportunities to work on projects remotely. The students are technically employed by the chamber, to meet T Level employment criteria, their work is managed and supported at the college. The project initially focuses on providing opportunities for T level digital marketing students.

  Tech Solent is also working with Solent Institute of Technology to promote T Levels to member businesses, many of which are successfully offering placements. The businesses are delighted with the quality of the students.

- **Early-Stage Work Experience in the Creative Economy** - CNS has supported Artswork (a Southampton based youth arts organisation) in developing a conversation regarding paid entry level opportunities in the sector. Such opportunities are particularly necessary, as it has become increasingly difficult for apprenticeship providers to create viable cohorts in the sector. Artswork have secured funding from Arts Council England for their breakthrough programme which funds 6 months of training and work placement for young creatives starting their career. Artswork is also working with Portsmouth Creates to establish the Portsmouth Creative Hub, Playlands, which brokers entry level career opportunities for young creatives.

- **Games Sector** - Over the past 18 months CNS has worked with Annie Durwood of Antivenin Games Ltd to map the games sector in the area. Annie has used this mapping to provide evidence to demonstrate the need for Bootcamps to support independent games producers. She has also established a network of Indie developers, which was launched on 25 October. This network has received support from Solent Growth Partnership Board.

- **Skills for life Bootcamps** - The LSIP identified creative industries as priority which has enabled the Solent Growth Partnership to facilitate a range of creative bootcamps. The current menu of creative sector related courses includes:

  - AI in Screen Production
  - Business for Creatives
  - Creative Gaming
  - Digital Marketing
  - Software Development

- **Film Skills** - Surrey and Hampshire Chamber of Commerce are working together to produce a sector plan to support skills development in the Film and Audio-Visual

Sector. This work has been supported by CNS and, at time of writing, will be launched at a round table at Farnborough Studios on 1 December.

- **LSIP refresh** - Hampshire Chamber is working to refresh the LSIP. Data Commissioned by CNS and Southampton City Council will be used to inform this work. This data reveals a creative workforce across the area of more than 100, 000 people of whom more than 30% freelance. The sector is also highly productive contributing over £5.5 billion to the local economy, GVA per job is in excess of £50k.

4. Preparing for the Establishment of the Combined Authority

4.1 Creative Network South (CNS) has sought to support partner organisations prepare for devolution and ensure the cultural and creative industries interests are understood as new governance arrangements evolve.

- **Higher Education Symposium** - CNS sponsored the Narrating Creative Regions Symposium, organised by the CNS research network at Solent University in January 2025. This conference explored the way universities can work within local governance structures to support the creative economy. Examples focused on work taking place in Cardiff and Exeter. The conference provided an early opportunity to explore what future partnership, working between higher education and a Combined Authority to support growth in the creative economy in our area might include.
- **Data** - CNS worked with Carolyn Abel, Director of Culture and Tourism, Southampton City Council, to develop an authoritative data set for the cultural and creative economy across the Hampshire and Solent combined authority area. Carolyn is the convening lead working with cross-authority colleagues and development agencies to provide options for the new MCCA to work with and capitalise on the benefits afforded by the culture, creative and visitor economies. This data set was prepared so as to ensure the contribution and potential of the cultural and creative industries to the local economy was understood. The executive summary of the report is included as **Appendix 1**. (The full report is available on request). The Data set has been presented to all Hampshire economic development officers.
- **Arts Council England** (ACE), with match funding from Solent Growth Board and Hampshire County Council are funding a further commission that will support the evidence base for the new MCCA - drawing on the experiences of established MCAs and options around how relationships might work. An oversight group involving Councillor Pitt (Solent Growth Partnership), Councillor Huggins (Hampshire County Council), Carolyn Abel (Southampton City Council) and Emma Noyce (Hampshire County Council) with ACE as observer will oversee this work. The Hampshire Chamber of Commerce is acting as neutral host body for the purposes of commissioning the work.
- **Engaging the sector in the Devolution Debate** - CNS has sought to work with Southampton Forward, Portsmouth Creates, Creative Island and Hampshire Culture Trust, to ensure the cultural and creative sector are engaged in the process of preparation for devolution in a way that ensures the sector has a voice. CNS has been represented at the events organised to engage the sector in pre devolution discussions which have taken place in Southampton, Winchester, and Portsmouth.

CNS has also attended a Creative and Digital Sector Roundtable organised by Hampshire County Council.

4.2 CNS has also sought to work with Tech Solent and the creative catalyst to ensure digital and commercial creative businesses can engage in networks, which are able to participate in the discussions which will shape the area's future economic development agenda. In the past this has been challenging, as the sector is largely made up of micro businesses that do not have capacity to attend many meetings.

5. Future Priorities

5.1 The work programme for 2025-26 will focus on

- **The Hampshire and Solent Film Agency** - Working with Portsmouth City Council and the advisory group to support FilmFixer building a successful self-sustaining Film Agency to serve the area.
- **Skills for the Creative Economy** - Working with Hampshire Chamber of Commerce on the refresh of the Local Skills Improvement Plan to ensure the creative industry skills agenda continues to be progressed in the area.
- **Devolution** - Working with local authorities and cultural sector partners to develop thinking on the way the Creative Sector can support the future priorities for the area.

5.2 Creative Network South will also continue to provide a meeting place for businesses and organisations with an interest in supporting the development of the creative economy. Additionally It will continue to act as the catalyst for sector development, supporting a network of networks.

RECOMMENDATIONS

It is recommended that the Overview and Scrutiny Committee:-

i) NOTES the contents of this report;

ii) NOTES that Joint Committee will be asked to:

(a) NOTE the contents of the report and the provision of PfSH support for the cultural and creative industries;

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iii) CONSIDERS any comments to pass on to Joint Committee for its consideration.

Appendices

a) Executive Summary of Creative Industry Data report prepared by 5th Sector.

Reference Papers: None

Enquiries: For further information on this report please contact:

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Appendix 1

Creative Industries Mapping for the Hampshire and Solent Combined Authority Area

Prepared by 5th Sector for Southampton City Council and Creative Network South. July 2025

Executive Summary

A thriving, evolving, and under-reported sector This report presents a comprehensive analysis of the Creative Industries in the Solent and Hampshire Combined Authority (SHCA) region, revealing a dynamic and resilient sector that is a significant driver of the local economy. Our research, combining official statistics with innovative data analysis, indicates the sector's Gross Value Added (GVA) is an estimated £5.25 billion, with a total workforce of over 80,000 individuals. A further 28,500 people work in related digital supply chains.

This is substantially larger than previously understood, primarily due to a large and often uncounted freelance and micro-business community.

Creative Industries are defined as, “Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.”

Key Findings

1. Significant economic contributor: The Creative Industries contribute an estimated £5.25 billion GVA when accounting for freelance and micro-business activity. National statistics suggest a 26% increase in Creative Industries GVA between 2020 and 2023.

2. A Tale of Two Sectors: The overall number of creative businesses registered at locations across SHCA has seen a decline of 17% since its 2020 peak, a figure driven almost entirely by a 31% contraction in the IT & Computer Consultancy sub-sector. In contrast, core creative fields like Advertising and marketing and Film, TV and Music (which more than doubled between 2010 and 2023) demonstrate strong, sustained growth, indicating a structural shift rather than a sector-wide decline.

3. The hidden workforce: Official figures (BRES) capture 39,800 Creative Industries employees, an 8.6% decline from the 2022 peak, reflecting changes in employment in computer consultancy. However, our analysis of professional network data (LinkedIn) reveals a much larger creative economy workforce of over 80,500 creatives with a further 28,500 workers in related digital supply chains. Our analysis suggests that more than 30% of the sector's creative talent operates on a freelance, contract, or micro-business basis, a critical factor for policy and support initiatives.

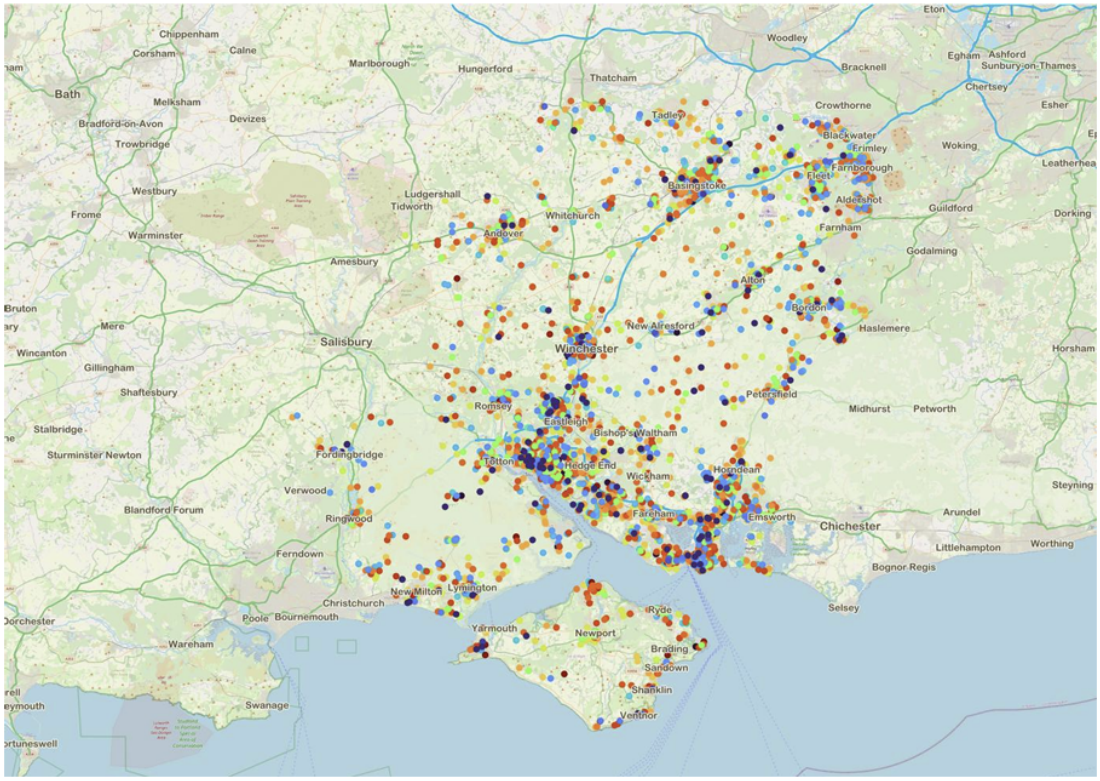
4. Missing businesses: official statistics identify 7,530 active Creative Industries firms registered in Hampshire, Isle of Wight, Portsmouth and Southampton, Analysis of

other databases shows more than 1,000 additional businesses registered in SHCA, and a further 2,800 business units active across the region but registered in other parts of Great Britain, making a total business population of 11,420.

5. Geographic & economic clustering: While traditional metrics show modest clustering of creative sub-sectors across SHCA, particularly in Advertising & Marketing (LQ 1.28) and Publishing (LQ 1.29), deeper analysis reveals powerful, localised hubs of creative activity in sectors including Film and television, Advertising and marketing, IT, software and computer services and Music, performing and visual arts. Furthermore, these creative clusters are often co-located with other professional services, creating a robust, interconnected economic ecosystem.

Mapping of creative and digital businesses across the Hampshire and Solent Combined Authority Area.

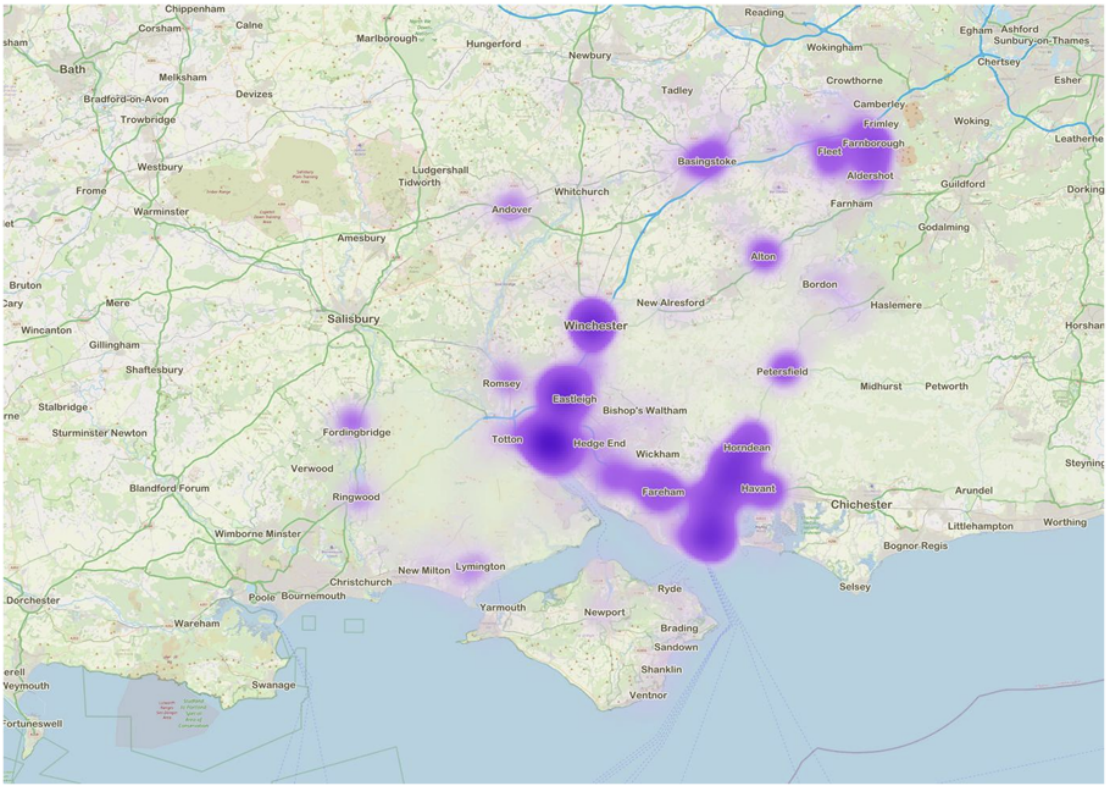
Figure 8 SHCA Creative Industries businesses - point markers



Source: The Fifth Sector/Unscrambled 2025

Heatmap of Creative Businesses

Figure 9 Heatmap of SHCA Creative Businesses



Source: The Fifth Sector/Unscrambled 2025

6. Wider economic impact of creative employment across the SHCA economy: Strong employment in both Services (31,246) and Tech (21,387) supply chains reflects the extent to which creative occupations form an important part of a professional business services sector wider than just Creative Industries,

Strategic Implications - A large proportion of SHCA's creative workforce operates outside traditional employment structures, highlighting the need for nuanced data interpretation. The evidence indicates the presence of a highly entrepreneurial and flexible creative workforce but also highlights potential challenges in accessing traditional business support and finance.

The data underscores the need for a nuanced approach to supporting the creative economy. A "one-size-fits-all" strategy is insufficient. Policy and investment should focus on:

• Nurturing the freelance ecosystem: Providing targeted support for the 23,000+ independent professionals – 31% of the creative workforce - who form the backbone of the industry.

• Strengthening high-growth sub-sectors: Capitalising on the momentum in areas like film, television, and advertising to drive regional growth.

• Fostering cross-sector innovation: Leveraging the co-location of creative and professional services to stimulate new business models and opportunities.

In conclusion, Solent & Hampshire Combined Authority's creative sector is larger, more resilient, and more complex than official data suggests. Understanding its unique composition is key to unlocking its full potential as a driver of economic prosperity and cultural vibrancy for the region.

Prepared by The Fifth Sector Limited

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