Oxfordshire's creative industries

Imagining the future

ENTERPRISE OXFORDSHIRE
An Oxfordshire County Council-owned company

Welcome to this introduction to the creative industries in Oxfordshire

The city of Oxford provides a unique backdrop, instantly recognisable the world over

Oxford University: The world's first English-speaking university

Our region has a long and revered tradition of artistic endeavour, along with a thriving modern high-tech creative industries ecosystem. It's a unique combination. A blend that allows creativity to flourish, both within the vibrant city of Oxford and in the peaceful surrounding countryside. A growing ecosystem that attracts both investment and exciting young talent.

Oxfordshire's central location provides easy access to London and proximity to Pinewood, as well as to the dynamic creative centres in England's south-west and Midlands.

In a city and region known today for their booming life sciences, energy, quantum and future mobility ecosystems, the range of Oxfordshire's creative industries may surprise you.

The creative sector in Oxfordshire:

- 4,969 creative sector businesses [1]
- 12.5% of all businesses [1]
- a high growth cluster [2]
- 11 creative microclusters [3]
- 3 rural clusters [4]
- largest publishing centre after London
- highly educated workforce, with 60% of the working age population qualified to degree level or above

Oxford Natural History Museum

Bodleian: UK's second largest library, with over 13 million items, and one of the oldest libraries in Europe.

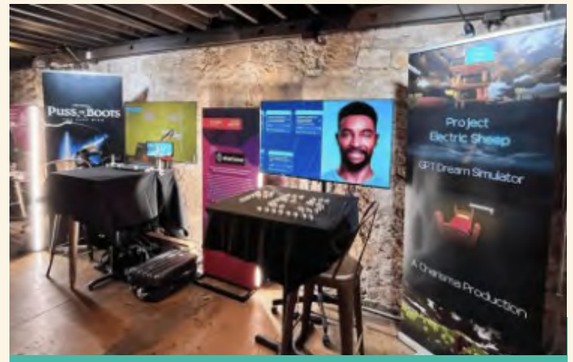
1 *Clusters data, Creative UK, July 2022*
2 *Creative Industries Sector Deal (2018)*
3 *Creative Industries Radar Mapping the UK's creative clusters and microclusters (2020)*
4 *Policy Evidence Centre & National Innovation Centre Rural Enterprise: Mapping and examining the determinants of England's rural creative microclusters (May 22))*

The creative industries in the UK

The UK's creative industries are world-leading. Influential, ingenious and technically accomplished, they are widely respected and known throughout the globe.

The sector is flourishing. Between 2010 to 2019, these industries grew one and a half times faster than the wider economy, generating £108 billion in economic value in 2021. More than 2.3 million people are employed in the creative industries in the UK, and this number has increased by 49% since 2011. The reach and impact of our creative industries is huge, and supports other sectors across the economy.

The UK's creative and digital sectors together contribute a total of £283 billion in gross value added (GVA) to the economy. The country is ranked third in the world for investment in CreaTech, behind the USA and China. Its growth depends on skills, and this is another reason why expanding organisations are attracted to Oxfordshire. There are AI centres of expertise at Oxford Brookes University and at the University of Oxford, which has been a consistent investor in AI, with several successful spinouts.



Profile: Charisma.ai

Central Oxford-based Charisma.ai offers a bridge between the creative and tech world. Its platform was developed to offer writers a 'controllable AI' based on natural language. Its approach has been recognised by Hollywood studios, AAA games developers, writers and technologists. The company partners with universities around the world, aiming to create new forms of entertainment and learning. Charisma.ai received seed funding from US investor Comcast NBCUniversal LIFT Labs as well as London-based VC firm Venrex.

Above: Blavatnik School of Government (left) and the Schwarzman Centre for Humanities (right)

Creative Oxford, rich with capabilities

Established in 1248, Oxford is synonymous with academia and learning. Literature, printing and publishing feature highly in its history, as does medicine, science and the car industry. Oxford has always had diverse capabilities, harnessed to an inherently innovative outlook. Writers, thinkers, designers and philosophers work alongside scientists and health specialists. Actors and performers thrive among analysts and computer experts.

Research

Creative industries in Oxfordshire can call upon the research capabilities of two universities.

The University of Oxford develops cutting-edge technologies which encourage innovation and new ways of working across the creative industries. Its commitment to the humanities encourages the brightest of cultural innovators.

Creative Industries research and innovation at Oxford Brookes University develops connections between research and industry, bringing together a network of researchers, professionals, and local communities to share their expertise on this diverse sector.

Investing in the humanities

Institutionally creative and collaborative, Oxford University continues to attract investment. The £185 million Schwarzman Centre aims to demonstrate the essential role of the humanities in helping society confront and answer the fundamental questions of the 21st century. It brings together Oxford's humanities subjects for the first time, as well as offering a new space for the performing arts. It is also home to Oxford's new Institute for Ethics in AI, which will lead the study of the ethical implications of artificial intelligence and other new computing technologies.

Oxfordshire's creative networks & training

Creative businesses contribute to, and benefit from, many networks within the region, including:

- The Oxford Technology and Media Network, which supports over 300 members.
- Film Oxford is a creative media charity and video production company which provides extensive training and activities for local filmmakers, artists, digital creators and young people. It has a programme of creative support, networking and exhibition, and supports Shadowlight Artists Collective, an award-winning independent group of digital artists with learning disabilities based in Oxfordshire. They also have created, with Enterprise Oxfordshire managed Visitor Economy Renaissance Programme funds, LOCO – Location Oxfordshire.
- Soho Farmhouse near Chipping Norton fosters a network of creative people and has a mentoring programme for 18–27-year-olds.
- Digimodo Studios - established in 2014, this experienced team of motion capture specialists works with state-of-the-art technology whilst training the next generation.

Oxfordshire flair

Oxfordshire's creative industries strengths lie in these areas:

- **film/TV production**
- **gaming**
- **publishing – the largest book publishing centre outside London**
- **IT software and computing services**

Film/TV production

Oxfordshire has a community of independent screen production companies. It includes Quick Silvermedia, producers of top class factual and current affairs documentaries for all the major broadcasters, and leading children's producer Novel Entertainment, along with moving image production and communications agency Indigo Dingo.

Documentary producers include Landmark Films and Oxford Digital Media. Various digital agency companies include Bounce Video and Oxford House Motion Pictures.

Key facilities and post production studios include Evolution Sound Studios and The Hall at Chipping Norton. Film companies include SilverLight Media; and, the award-winning independent TV, film, book and comic publisher Rebellion, perhaps best known as a video games developer.

A group of gamers

Rebellion, creator of Sniper Elite, Zombie Army, Evil Genius, and 2000AD, is one of the world's most successful independent video games studios. It has 30 years of games production and two decades at the forefront of performance capture technology. It is redefining the gaming industry, bringing together cutting-edge film and TV production and stages at its Rebellion Studios, Didcot, where it has invested £78 million and created many new jobs. Atomfall, a survival game set in the quintessentially English Lake District, has been an international success and BAFTA winner.

Oxford-based First Touch Games is an award-winning studio whose best-known games are Score! Hero and Dream League Soccer. Outside the city, successful gaming companies include Excalibur Games and Two Tails.

Rebellion Studios.

Profile: Vicon, a pioneer in motion capture

Vicon has been leading motion capture technology for over 40 years, with applications in media and entertainment as well as life sciences, location-based virtual reality, and engineering. Designing and developing its own motion capture technology, it works with major production studios and games developers including Sony, Activision and Disney. Its first Vicon product was introduced in 1979, manufactured by a subsidiary of Oxford Instruments. In 2003, Sony Pictures Imageworks was the first studio to use over 200 Vicon cameras for Monster House. It launched its VFX software platform Shōgun in 2017 and location-based VR Evoke in 2018. Recently it has developed markerless technology, dramatically reducing time to animation. Vicon's primary location is in Yarnton, Oxfordshire and it has offices in Colorado and California.

A plethora of publishers

Oxfordshire's publishing companies include Oxford University Press, the globe's largest university press, which has been in existence for over 500 years. The world's second oldest university publisher, it produces over 6,000 titles a year. Also within the county is Hachette, the UK's second largest book publishing group; Taylor & Francis, a leading publisher of scholarly and medical research based at Milton Park where it employs 900 people; Elsevier, a global leader in information and analytics and education for healthcare professionals, which has its corporate office at Arc Oxford, and German-owned Macmillan, home to some of the world's leading authors and creators. Pearson, which employs over 20,000 worldwide and has a market capitalisation of £6.8 billion, is based in the north of the city of Oxford.

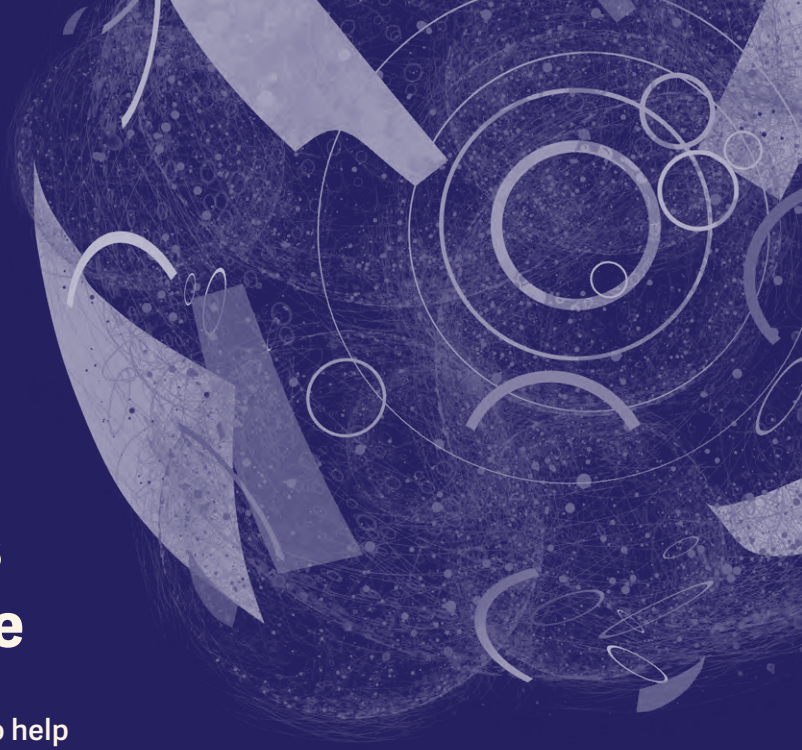
Investing in Oxfordshire's creative industries

The creative industries account for 10% of all inward UK foreign direct investment (FDI) projects.[1]

The UK ranks second for six out of nine sub-sectors – advertising and marketing; film, TV, video, radio and photography; publishing; architecture; design and designer fashion; music, performing and visual arts. It is third in IT, software and computer services, which account for over 70% of FDI projects. Most inward investment in the form of mergers and acquisitions is clustered around the south-east of England, which includes Oxfordshire.

Until recently, the majority – 80% – of foreign investors in the UK's creative industries have been from North America and Europe. Now there is also notable investment in new projects from emerging markets such as India and China.

1 *Creative Industries Policy and Evidence Centre. Foreign Direct Investment in the UK's Creative Industries*



Support for businesses investing in Oxfordshire

We provide comprehensive tailored assistance to help companies from across the world establish their new operation in the area.

Our Inward Investment team offers a range of support including:

- Identifying commercial premises and co-ordinating property viewings.
- Facilitating introductions to the University of Oxford and Oxford Brookes University.
- Making introductions to Oxfordshire's science and research facilities.
- Connecting businesses with professional service providers, business support organisations and sector specific networks.
- Offering assistance with graduate recruitment and training support including apprenticeships.
- Providing ongoing aftercare support to Oxfordshire-based companies.
- Promoting investment opportunities in key sectors, clusters and capabilities to a global audience.
- Maximising investment into our Enterprise Zones.
- Supporting businesses to trade internationally, working with the UK Government Department of Business and Trade's international trade advisory service.

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