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# Cultural industries, cultural clusters and the city: the example of natural history film-making in Bristol

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**Abstract**

This paper explores the structure of the natural history film-making cluster in Bristol in the light of wider theories concerning the nature and importance of clusters in urban growth. After reviewing relevant literature concerning clustering in the cultural industries, and an overview of the cultural industries sector in Bristol, the paper proceeds to analyse this particular cluster in more detail. The analysis proceeds by examining in turn the origins and stages of cluster gowth, different aspects of cluster depth, linkages between the local cluster and the global economy, institutional thickness and cluster support, and the current dynamics of change. The final section relates the findings back to questions of cluster definition and local policy initiatives. © 2002 Published by Elsevier Science Ltd.

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## 1. Introduction

Over the past decade there has been a resurgence of interest in the spatial clustering of different kinds of economic activity (Gordon and McCann, 2000), and the nurturing of such clusters has become an important component of public policy both at the regional and local scale. The recent DTI report on business clusters in the UK defines clusters as ‘‘geographic concentrations of interconnected companies, specialised suppliers, service providers, firms in related industries, and associated institutions (for example, universities, standards agencies, and trade associations) in particular fields that compete but also co-operate’’ (DTI, 2001, p. 14). Such clusters are regarded as important because they lead to higher growth through raising productivity, increasing firms’ capacities for innovation by diffusing technological knowledge and innovation more rapidly, and stimulating higher rates of new business formation through spin-off ventures.

Empirical analyses have identified various types of clusters. For example, Markusen (1996) inductively derived four spatial types; the ‘‘Marshallian Industrial District’’, the ‘‘Hub-and-spoke Industrial District’’, the ‘‘Satellite Platform’’, and the ‘‘State-anchored District’’, though she argued that in practice most clusters were likely to be a mix of all four models. The DTI report, on the other hand, which identified 154 UK clusters in all, classified them according to their ‘‘stage of development’’ (embryonic, established, mature); ‘‘depth’’ (the number of industrial and other linkages); ‘‘employment dynamic’’ (employment growing, declining or stable); and their ‘‘significance’’ (whether international, national or regional). As a final example, Capello (1999) has suggested a series of distinctions between ‘‘geographical concentrations’’, ‘‘specialised areas’’, ‘‘industrial districts’’, ‘‘milieux’’, and ‘‘innovative milieux’’, according to the levels of linkages, interactions, and collective learning within the cluster.

In this paper we are specifically concerned with evidence for clustering in the cultural industries.The cultural (or creative) products industries have attracted increasing attention from researchers and policy makers in recent years, not least because of their evident importance to employment and economic growth. Although precise definitions vary, a broad definition would include sectors such as film and video produc-

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tion, music production, printing and publishing, multimedia, the performing arts, fashion and industrial design (e.g. Creative Industries Task Force, 1998). Such industries are characterised by their output of commercialised products with a high aesthetic and symbolic content, reflecting "the tendency in modern capitalism for cultural production to be increasingly commodified, while commodities themselves become increasingly invested with symbolic value" (Scott, 2000, p. 3).

The cultural industries are also characterised by a distinctive set of production and distribution relations. As regards *production*, Scott (1996, 1997, 2000) argues that such industries are marked by five main technological–organisational elements. First, their technologies and labour processes often require a large amount of skilled labour supported to an increasing degree by advanced, flexible computer technologies. Second, production is almost always organised in dense networks of small and medium sized firms which are strongly interdependent. Third, these dense networks form "multi-facetted industrial complexes" that exert high levels of demand on local labour markets and require a wide variety of labour skills. Fourth, such industrial complexes are replete with a wide variety of external economies. Fifth, such complexes also rely for their successful functioning on a range of institutional infrastructures that provide overheads, support flows of information, and promote trust and co-operation between producers. As a result of these strong interconnections and powerful external economies, agglomerative tendencies are strong, and cultural products industries are thus often found in localised, spatial clusters in favoured urban centres.

As regards *distribution*, however, Scott argues that local networks of small producers are likely to be embedded in global distribution networks which tend to be dominated by a handful of large cultural and media conglomerates. As a result, cultural industries are "stretched across a force-field of global and local relationships" (Scott, 2000, p. 4), with production more and more localised in privileged clusters and outputs distributed across wider and wider networks of consumption. The sites of these clusters are typically world cities or nationally dominant cultural nodes such as Paris and Los Angeles, where the distinctive characteristics of place are symbiotically entwined with the images of locally produced, cultural products (Molotch, 1996). However, Scott suggests that certain favoured cities further down the urban hierarchy may be able to sustain smaller, though perhaps more dependent, clusters of activity. This is indeed the case in Bristol, identified in the DTI report as a centre for a small but internationally significant TV and digital media cluster in the South West.

## 2. The local context: cultural industries in Bristol

Bristol is the largest city in the South West region with a population approaching 500,000. It is an attractive and affluent city with an important aerospace industry, but its recent prosperity is more related to the considerable growth in employment in a wide range of service industries, particularly financial and business services. Although Bristol primarily markets itself as a site for high technology and advanced services, local policies have focussed increasing attention on the growth of the city's cultural industries, even claiming that Bristol is now Britain's "second media city" (BCC, 2000; Griffiths et al., 1999).

Defining and measuring the city's cultural sector is particularly difficult given the inadequacies of existing data sources. Different researchers have, for example, used different combinations of sectors from the Census of Employment to estimate overall employment levels. A fairly standard definition, used by O'Brien and Feist (1996), includes the production of records and tapes, printing and publishing, film and television production and distribution, artistic production, and employment in libraries, museums and art galleries. By this definition the total employment in the Bristol TTWA was just over 3000 in 1998, or less than 1% of total employment. A recent survey of the Bristol media sector (Hayman, 2000), using a slightly different range of categories, arrived at a figure of around 4000. However, if we use the much broader definition of the "cultural industries production system" suggested by Pratt (1997), which combines employment in production activities, infrastructure provision, distribution, and consumption, we arrive at the figures shown in Table 1. Bristol's total rises to 10,500, though the extent of London's domination in the cultural industries is also clear from the totals and the location quotients.

The figures in Table 1 also indicate that if Bristol does have a distinctive strength it is in cultural production activities, and employment in this category increased 36% between 1991 and 1997. Within this production total the largest single sub-component is for radio and television production, where employment is dominated by two big employers, Public Broadcasting Services (BBC) Bristol and HTV-West. BBC Bristol is one of the BBCs main regional production centers, and employs around 800 employees in three main units; one covering production in natural history, animation and documentary features; another covering regional broadcasting; and a third providing a range of production facilities. HTV-West (now owned by Granada) is the commercial channel, but it makes many fewer programmes for local and national networking than the BBC.

In terms of distinctive production genres, the Bristol area has a specialist strength in two areas, natural his-