Leicester Cultural and Creative Industries

Assessment of Leicester's cultural and creative industries sector businesses and workforce

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THE FIFTH SECTOR

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Summary

The key findings of desk research were:

- Leicester is home to more than **1,400 active cultural and creative industries businesses** – 585 more than reflected in national statistics, a difference of 70%.
- Analysis of alternative data sources suggests that Leicester has a cultural and creative workforce of **15,600** (2.9 times the total for these sectors shown in national employment statistics).
- Creative workforce of **30,365** in Leicester & Leicestershire LEP is 2.2 times larger than shown in national employment statistics.
- Leicester's CCI sector is able to draw on a freelance creative workforce of some 20,000 people based within the city's TTWA (travel to work area).
- CCI sector **employment grew by 32.4%** (to 5,310) between 2015 and 2022 but remains marginally below its 2020 level.
- The city's **performing and visual arts** sector has rebounded strongly since lockdown, with employment now at six times its 2020 level.
- Volatility in business numbers and employment in computer consultancy obscures a resurgence in **software development and publishing** (including computer games), with employment now 20% higher than 2020 levels and showing recovery of more than 50% between 2021 and 2022
- Employment in **Film, TV and Music** has fallen back from its peak in 2021 but is still higher than at any other time since 2015.
- Key sector strengths exist in **Advertising & Marketing, Arts, Film, TV & Music** and **Design & Designer Fashion**, each of which boasts more than 100 companies in the city and is growing strongly.
- Whilst ONS data suggests both business numbers and employment in **Design and Designer Fashion** are in long-term decline, LinkedIn shows a population of 1,800 designers in the city and more than 4,000 across the LEP area, reflecting the higher proportion of freelance consultants working in this discipline and a move to home/hybrid working affecting patterns of work.

The Fifth Sector Limited

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1. Creative Businesses

The scale of the population of cultural and creative industries (CCI) businesses in Leicester was measured in two ways:

- Through analysis of 'Active' companies' data held by Companies House as of January 2024, parsed via Beauhurst.
- Through analysis of the Office of National Statistics' (ONS) Interdepartmental Business Review (IDBR) data on business populations between 2015 and 2023, accessed via Nomisweb.

The same sector definitions, consistent with DCMS's methodology of measuring Cultural and Creative Industries (see Table 1, below) were used for both indices[1].

Note on methodology

Throughout this report we have analysed computer consultancy businesses and employment (62020) separately from IT, software and computer services. Although it consistently forms the largest sub-sector within Creative Industries, it can be seen to distort the relative importance of more 'creative' software occupations, which also have a closer relationship to other content creation and creative services supply chains. Also, our studies over the last three years have highlighted a repeated picture of increased volatility in the number of computer consultancy businesses and levels of employment as a result of structural changes to the sector exacerbated by the impact of Covid-19 lockdowns.

In some instances, we have further separated out computer games developers and publishers from other software and computer consultancies businesses to more clearly identify this sub-sector and to facilitate Supply chain analysis.

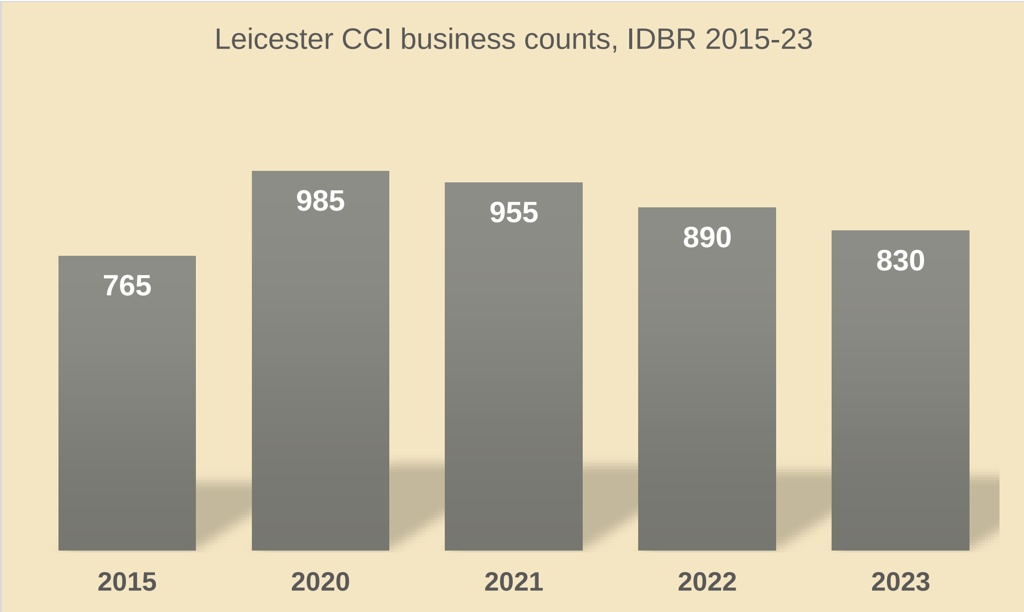
Leicester CCI sector business counts 2015-2023

Analysis of IDBR data shows growth in the sector between 2015 and 2020 but a steady decline in the number of businesses since 2020.

However, the whole of the net loss of businesses (and more) between 2020 and 2023 is accounted for by one SIC code – 62020, computer consultancy – which declined from 490 to 295 businesses.

[1] List of SIC codes and sub-sector definitions at Appendix 1, below

Figure 1 Leicester CCI business counts



Source: The Fifth Sector analysis of IDBR, January 2024

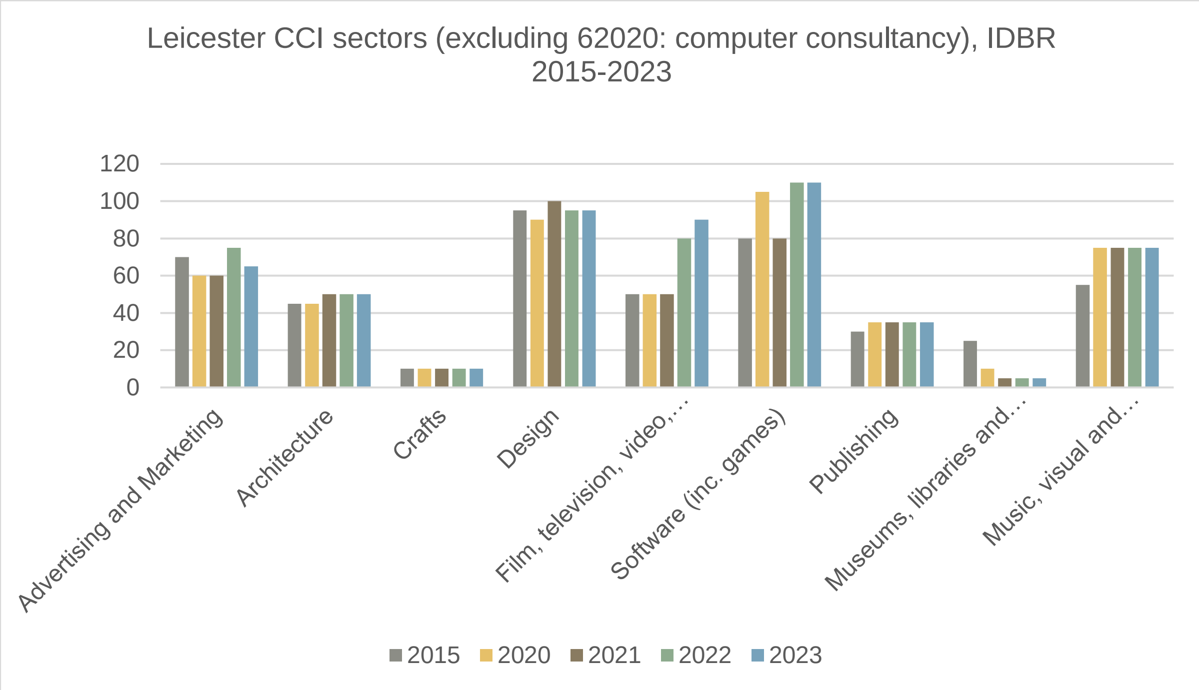
Impact of Covid-19 on computer consultancy businesses

The decline in the number computer consultancy businesses reflects a national picture of sector restructuring – an impact of Covid-19 lockdowns which resulted in a consolidation of larger firms in the sector and a reduction in the number of micro and small enterprises. Analysis of Companies House annual returns data indicates that a significant proportion of businesses (in particular in IT) were dormant through the pandemic. Although there was a recovery in the count of active IT businesses (to 590) by November 2022, this is still below 2019 totals, and there was a further decline in the number of active computer consultancy firms between 2022 and 2023.

Removing data on computer consultancy gives a clearer impression of the growth trend in other creative sectors, as detailed in

Figure 2 below.

Figure 2 Leicester CCI business counts (excluding 62020: computer consultancy), IDBR 2015-2023



Source: The Fifth Sector analysis of IDBR, January 2024

Analysis of IDBR suggests that the long-term impact of Covid-19 on the creative sector has not been severe as feared at the time[2], when it was predicted that the East Midlands would lose 1,500 jobs and 31% of Creative Industries GVA, and both the impact and the rate at which business counts recovered varied by sector.

Figure 2 (above) illustrates that:

- **Software publishing and development** (including computer games) was the most volatile subsector, growing more strongly between 2015 and 2020, falling back sharply between 2020 and 2021 and then recovering to above 2020 levels by 2022.
- **Music, visual and performing arts** (perhaps surprisingly in light of doomy prognostications during the lockdowns) grew between 2015 and 2020 and maintained those levels.
- **Film and television numbers** were 'flat' between 2015 and 2021 – which again seems to go against the narrative of the impact of the effective shutdown of filming for most of 2020 – but showed significant growth in 2022.
- Business numbers in **creative services** (including advertising, marketing, architecture and design) and **publishing** seem to have held up well.

However, in many of these sectors with a high proportion of freelance working, the employment record (see

[2] Oxford Economics (2020). The Projected Economic Impact of Covid 19 on the UK Creative Industries

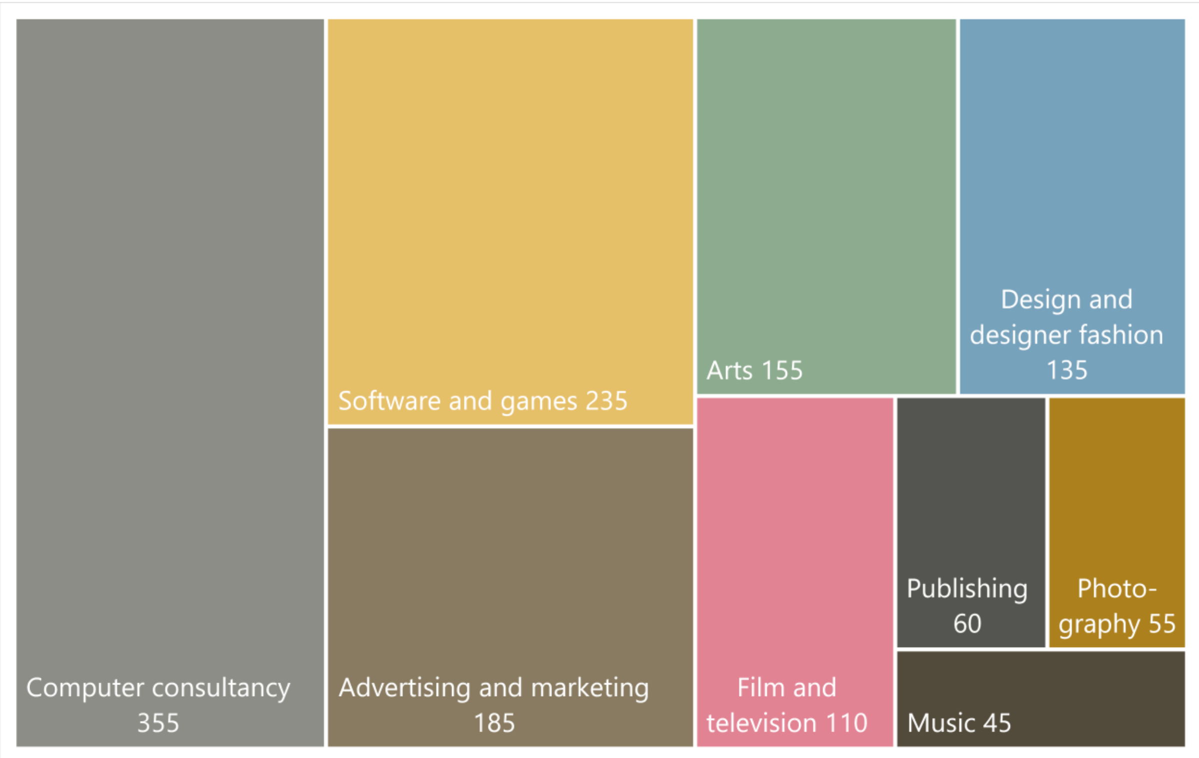
Creative workforce, below) gives a better impression of both the impact of Covid-19 disruption and subsequent recovery.

Alternative data source - Beauhurst

We find in in studies across England that IDBR under-reports the number of active cultural and creative enterprises (an effect which increases in cities outside the South East) – in part due to the sampling methodology used. To provide additional insights, we parse the number of active registered businesses at Companies House using Beauhurst.

Our findings for Leicester are consistent with the pattern we observe in other regional cities: our analysis suggests that **Leicester has 1,415 'active' registered businesses** within DCMS's SIC-code based definition of cultural and creative industries, a difference of 585 (70%) from the latest IDBR data.

Figure 3 Count of Leicester CCI businesses, January 2024 – n=1,415



Source: The Fifth Sector analysis of Companies House data, parsed via Beauhurst, January 2024. Excludes Cultural Education (15 businesses) and Radio (5). All numbers rounded to nearest 5 to minimise risk of disclosure.

Comparison of datasets

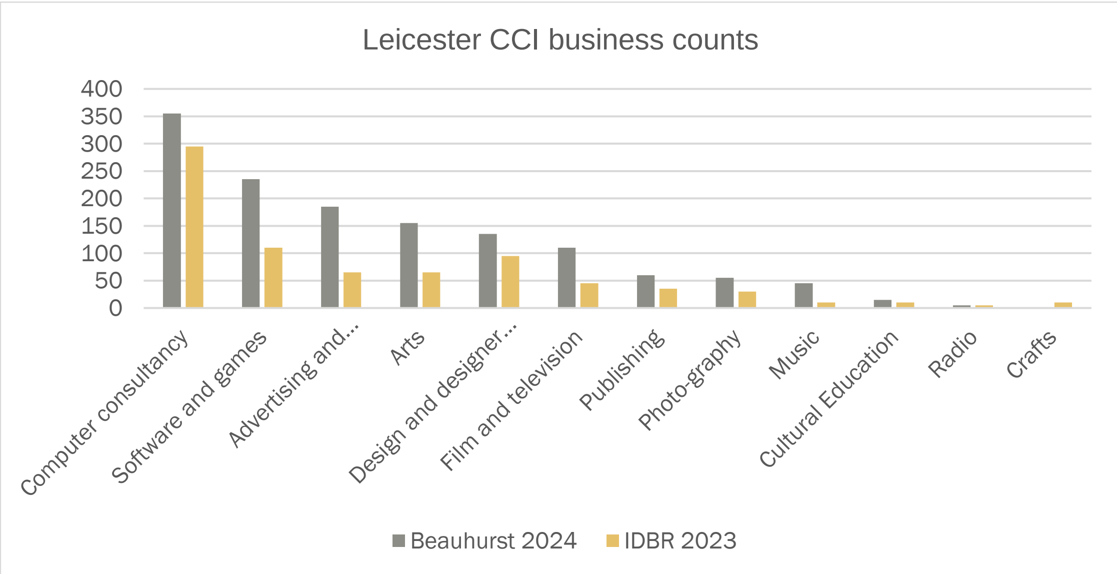
Comparing our analysis of Companies House data with IDBR, the discrepancies were greatest in:

- **Software development and publishing (including computer games)**: 235 businesses, 125 (114%) more than in IDBR.

- **Advertising and marketing**: 185 businesses, 120 (185%) more than in IDBR.
- **Arts** (performing arts, support activities to performing arts, artistic creation and operation of cultural venues): 155 businesses, 90 (138%) more than the IDBR total.
- **Film and television**- 110 businesses, 65 (144%) more than in IDBR.

Despite the volatility analysed earlier in this report, Companies House data shows that **Computer consultancy (SIC 62020)** remains the single sub-sector with the greatest number of active registered businesses, 355 in total, 60 (20%) more than shown in IDBR.

Figure 4 Comparison of Beauhurst and IDBR data on Leicester's Cultural and Creative Industries sector



Source: The Fifth Sector analysis of Companies House data, via Beauhurst and ONS data, via Nomisweb.

However, business counts only tell part of the story. As observed previously, cultural and creative industries differs from many other sectors of the economy in the level of its freelance and self-employed workforce, whose significance we explore in more detail in the next section.

2. Creative workforce

Again, two methods were used to counter the observed effect that the accuracy of ONS data on employment in creative industries is questionable in smaller geographies and that this effect is more evident outside London and the South East. Our approach in Leicester was consistent with the methodology used in mapping creative sectors in other parts of England, combining:

- ONS data from the Business Register and Employment Survey (BRES) to present us with trends data and to allow for national comparisons.
- Analysis of LinkedIn profiles for Leicester and Leicestershire to give a more accurate measure of the scale and capacity of the creative workforce within a travel to work area of Leicester.

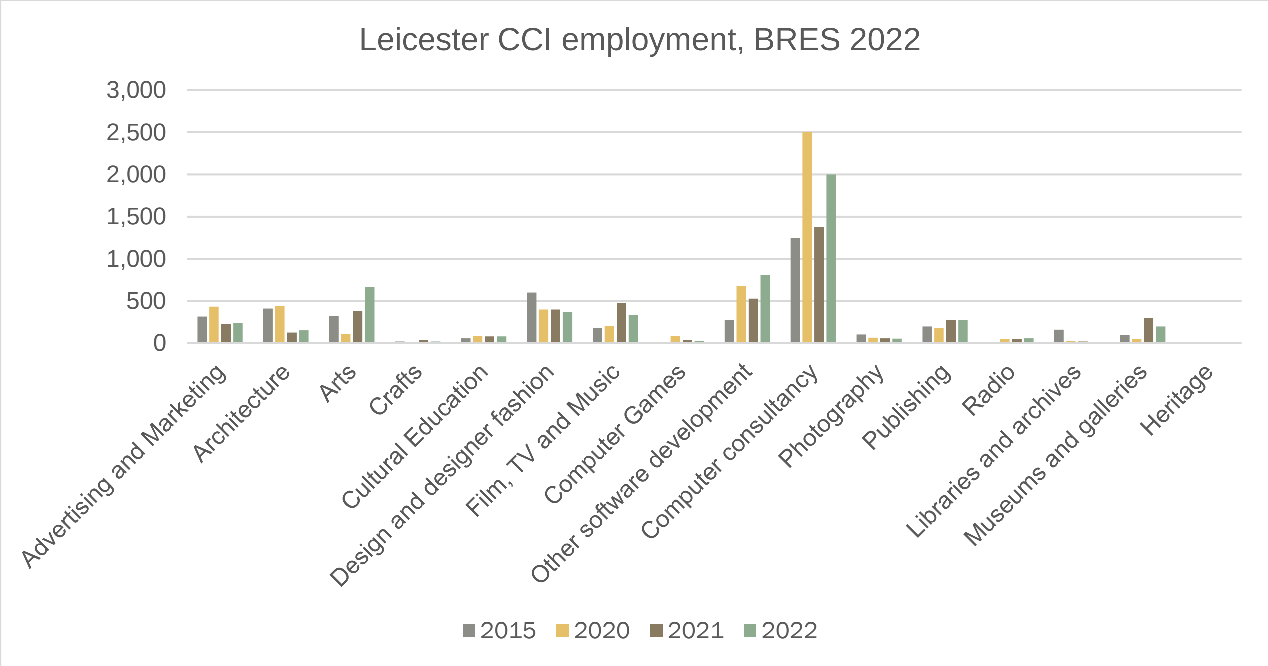
BRES data on creative industries employment

As with IDBR data on business numbers, BRES tends to underestimate the size of the creative workforce as it is based on a survey of a comparatively small sample of UK businesses (c. 85,000, with a response rate of around 85%) and only includes full and part-time employment, not freelance or self-employed work. Its value, therefore, is in providing trend data (eg, to allow us to gauge the impact of the Covid-19 pandemic on the sector) and nationally comparable figures – although the flaws in the sampling methodology are more pronounced for smaller populations, as London and the South East still account for around 60% of all creative businesses and employment.

We compared BRES data for 2015, 2020, 2021 and 2022 (the latest year for which data is publicly available via Nomisweb):

- 2015-2020 gives us a trend of employment growth (the 2020 survey was conducted in April 2020, so represents a 'high water mark' of employment at the time of the first 'lockdown', which commenced on 23 March 2020
- 2020-2021 gives us an impression of the impact of Covid-19 on sector employment
- 2021-22 gives a better idea of the rate at which employment has recovered in different creative sectors

Figure 5 CCI employment in Leicester, 2015-2022



Source: The Fifth Sector analysis of ONS data via Nomisweb, January 2024

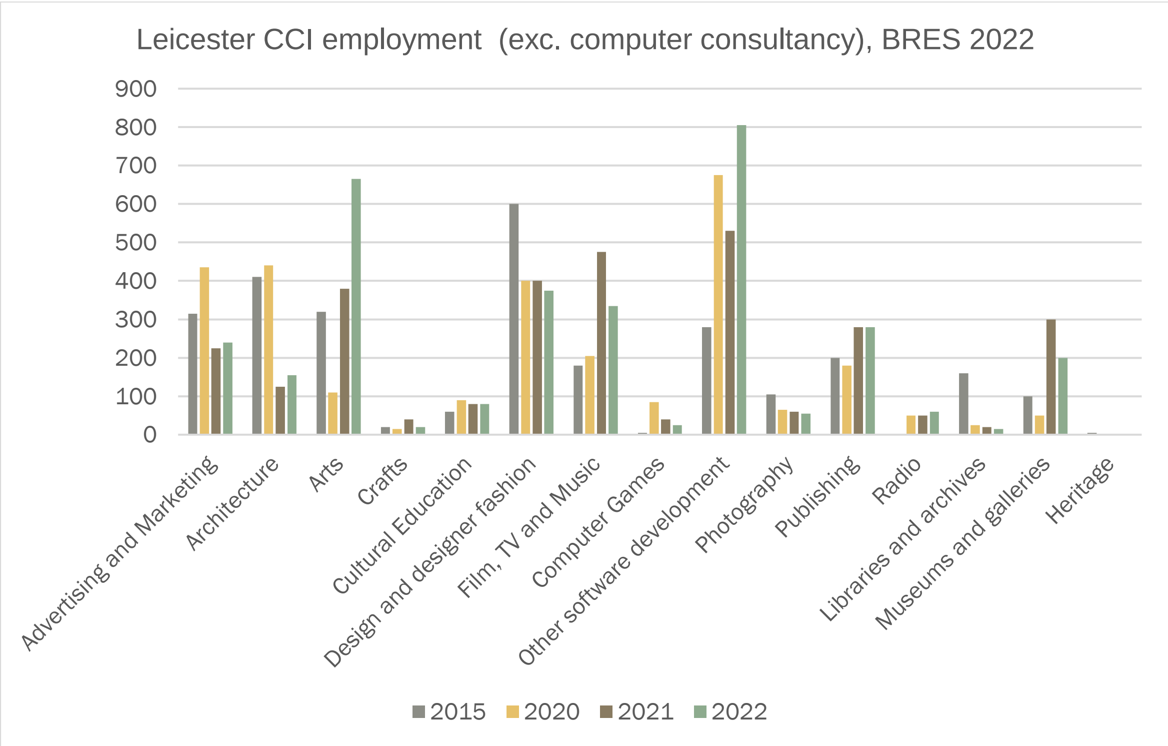
Analysis reveals the following trends in creative employment:

- CCI sector **employment grew by 32.4%** (to 5,310) between 2015 and 2022 but remains marginally below its 2020 level.
- Employment in **computer consultancy** (SIC 62020) is the most volatile of all creative sectors – a trend we observe in studies across the UK - with significant job losses during Covid-19 and employment still to return to pre-Covid levels by 2022.
- Rapid bounce back in **performing and visual arts**, with employment now at six times its 2020 level.
- Resurgence in **software development and publishing** (including computer games), with employment now 20% higher than 2020 levels and showing recovery of more than 50% between 2021 and 2022
- Employment in **Film, TV and Music** has fallen back from its peak in 2021 but is still higher than at any other time since 2015.

Impact of removing computer consultancy

Again, removing computer consultancy (SIC 62020) from the data presents a clearer picture of employment trends in other cultural and creative sectors:

Figure 6 Trend in CCI employment in Leicester 2015-2022 (excluding computer consultancy)



Source: The Fifth Sector analysis of ONS data via Nomisweb, January 2024

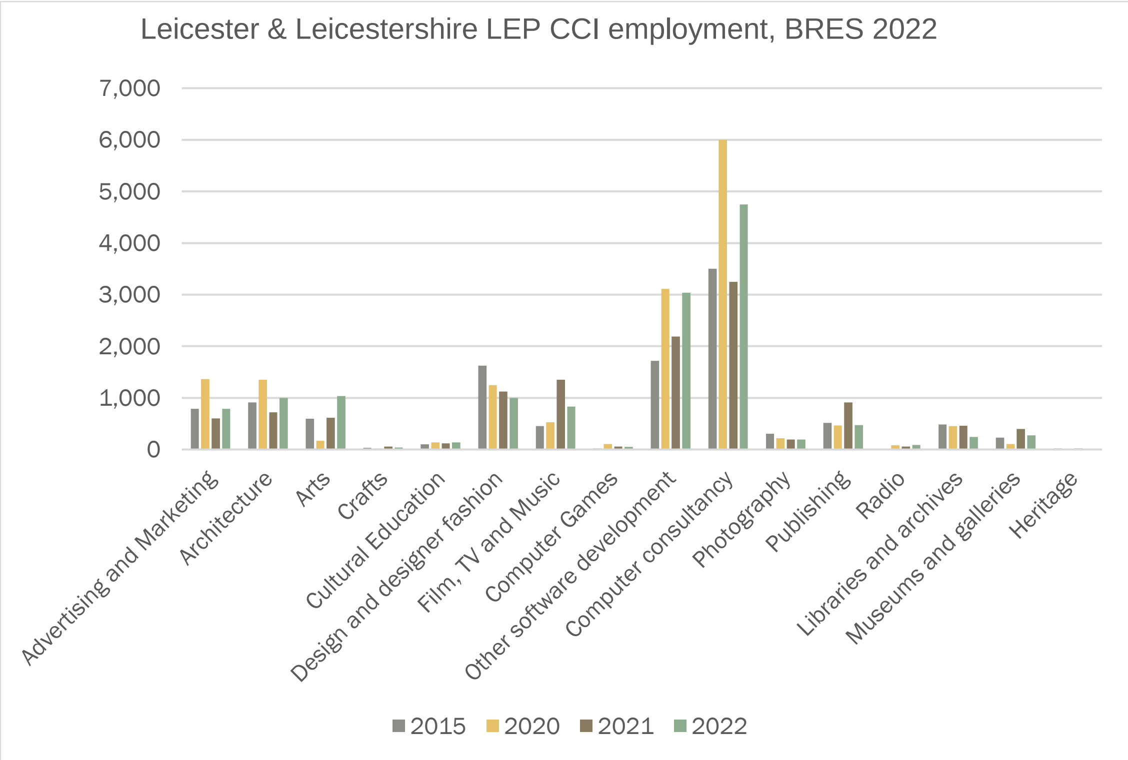
The net result is employment growth of 20% between 2015 and 2022, from 2,760 to 3,310 jobs, with half of that growth coming between 2021 and 2022.

- Employment in **software development and publishing** has grown by 188%, from 280 to 805 jobs. Computer games add
- **Performing and visual arts** employment has grown by 108% (to 655 jobs) and now represents more than 20% of creative employment in the city.
- **Film, TV and Music**, despite falling back in 2022, shows net growth of 86% (155 new jobs) since 2015.
- Creative service occupations (**advertising, marketing, architecture and design**) have declined. There is evidence of rebalancing between design employment (a proportion of which, given the breadth of the SIC code, will fall in other sectors and industries) and software development.
- **Publishing** rebounded strongly in 2021 and maintained those gains in 2022.

Leicester & Leicestershire LEP area

Data for Leicester & Leicestershire LEP follow a similar pattern to that observed in the city of Leicester:

Figure 7 CCI employment in Leicester & Leicestershire LEP 2015-2022



Source: The Fifth Sector analysis of ONS data via Nomisweb, January 2024

The most striking finding is the growth in employment in **Arts** since its low point in 2020 to 1,035 jobs – 74% higher than in 2015 and representing an additional 865 jobs since its low point in 2020.

Even more so than in the city, the rapid growth of ICT sectors between 2015-2020 was wiped out between 2020 and 2021. Software development and publishing recovered to its 2020 levels but computer consultancy, whilst still at its highest level at any time since 2015 other than 2020, did not rebound so strongly.

Creative services (advertising, marketing and architecture) follow a similar trend to computer consultancy and have yet to recover to 2020 employment levels.

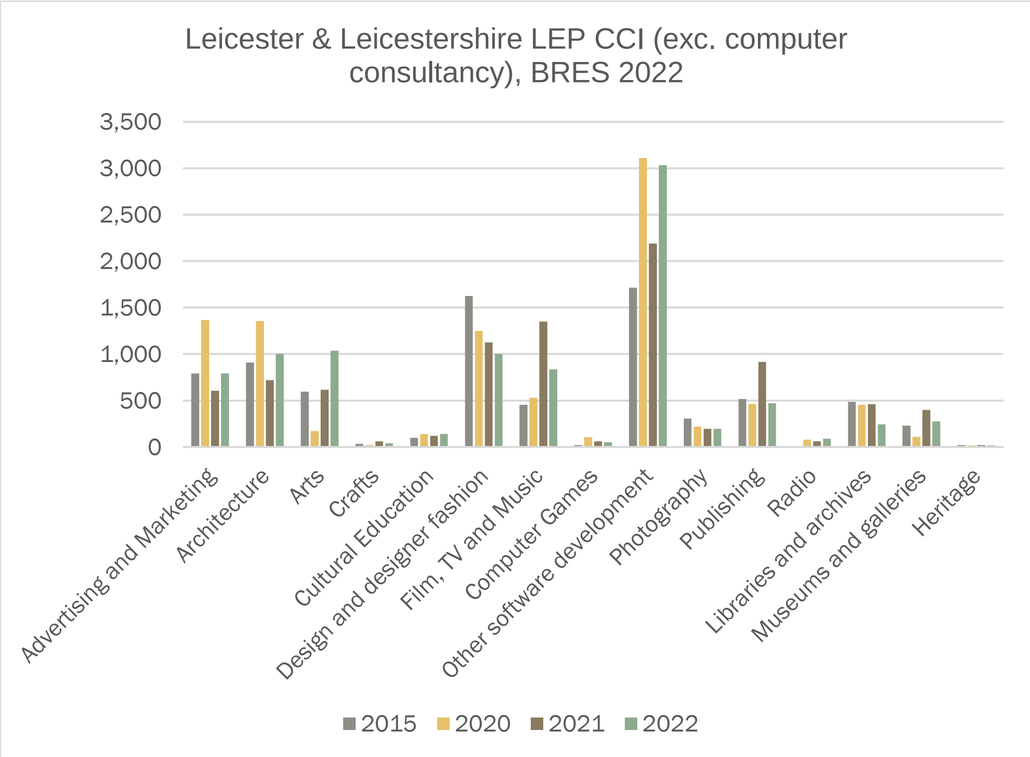
Design and designer fashion again reflects decline over the period.

Publishing and Film, TV and Music showed an *increase* in employment between 2020 and 2021 before falling back in 2022.

Impact of removing computer consultancy

Again, removing data on employment in computer consultancy (SIC 62020) gives a picture which differs little from the one observed in the city, other than reflecting a stronger county-wide recovery in software development and publishing:

Figure 8 CCI employment in Leicester and Leicestershire LEP (excluding ICT)



Source: The Fifth Sector analysis of ONS data via Nomisweb, January 2024

Alternative data source - LinkedIn

We use LinkedIn as a much larger sample (27.5 million UK subscribers) of data on creative employment. LinkedIn data has several advantages over BRES:

- A much larger sample size – there are more than 172,000 registered users of LinkedIn in Leicester and a further 140,000 in the wider LEP area.
- Membership includes freelance and self-employed workers, as well as employees.
- LinkedIn uses industry codes which relate more closely to specific activity within creative industries – including Animation, Computer Games, Fine Art.
- LinkedIn data is provided by subscribers, not by survey – as it is primarily a platform which advertises people's availability for work, the users are more likely to keep their profile updated.

- It allows us to derive information about individuals' academic qualifications, skills, employment history and seniority from which we can draw further conclusions about volatility of employment within particular sectors.

Our analysis groups industry codes into five supply chains which draw upon similar skill sets – as shown in Figure 9, below. This also allows us to compare data about accredited courses and continuing professional development with evidence of skills in the workforce drawn from LinkedIn, and with evidence of skills gaps and shortages drawn from industry surveys and primary research.

Figure 9 Workforce themes and categories - Leicester

Content	Experiences	Originals	Services	Digital
Animation	Performing Arts	Apparel and Fashion	Marketing and Advertising	Computer Software
Broadcast Media	Music	Fine Art	Design (part)	
Motion Pictures & Film	Museums and Institutions	Arts and Crafts	Graphic Design	
Publishing	Libraries	Design (part)	Architecture and Planning	
Mobile Games			Writing and Editing (part)	
Computer Games				
Newspapers				
Writing and Editing (part)				
Photography				

Source: The Fifth Sector and Curator Technologies

Our analysis includes Computer Software – which is the closest parallel to the Standard Occupations Codes relating to software development used by DCMS to define the IT, software and computer services sector within Creative Industries. We exclude other LinkedIn industry codes relating to computer hardware, telecoms and computer consultancy to align our results more closely to creative industries.

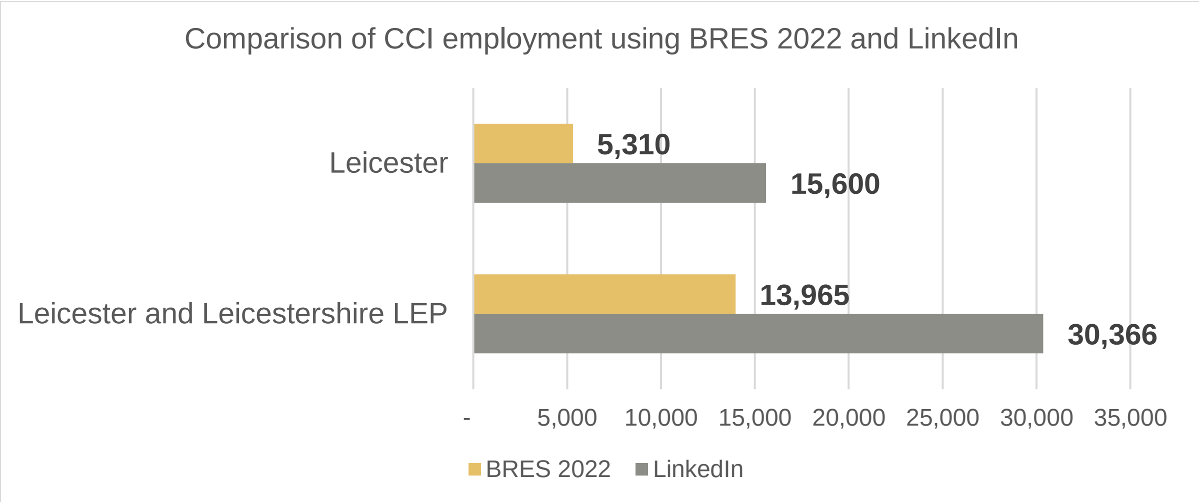
Some Industry codes align to more than one creative supply chain: Writing and Editing is divided into creative writing (in Content) and copywriting (within Services); Design is divided into Originals (makers and product designers) and Services (including service design, web design).

Comparing BRES and LinkedIn data

Comparison of BRES and LinkedIn data reflects the high proportion of freelance and self-employed workers in the sector. It demonstrates:

- Creative workforce of 15,600 in Leicester (2.9 times the total employment for these sectors shown in BRES)
- Creative workforce of 30,366 in Leicester & Leicestershire LEP (2.2 times the total shown in BRES)

Figure 10 Creative employment: comparison of BRES (2022) and LinkedIn (November 2022)

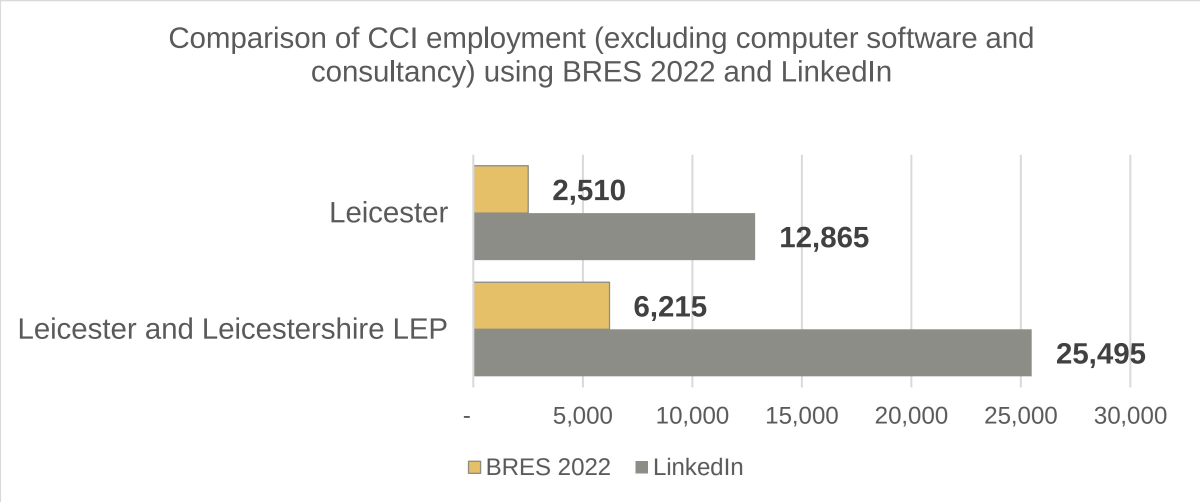


Source: The Fifth Sector analysis of BRES 2022 and Curator analysis of LinkedIn Data, November 2022

The fact that the discrepancy between the datasets is smaller for the larger geography bears out the sampling errors inherent in applying BRES data to creative workforces.

Removing computer software from the LinkedIn totals, and comparing this with BRES data with the non-computer games elements of ICT removed, paints an even starker contrast:

Figure 11 Creative employment (excluding ICT): comparison of BRES (2021) and LinkedIn (November 2022)



Source: The Fifth Sector analysis of BRES 2022 and Curator analysis of LinkedIn Data, November 2022

This suggests that the cultural and creative workforce in Leicester is more than *five times* greater than shown in national employment statistics, and more four times greater across the LEP area.

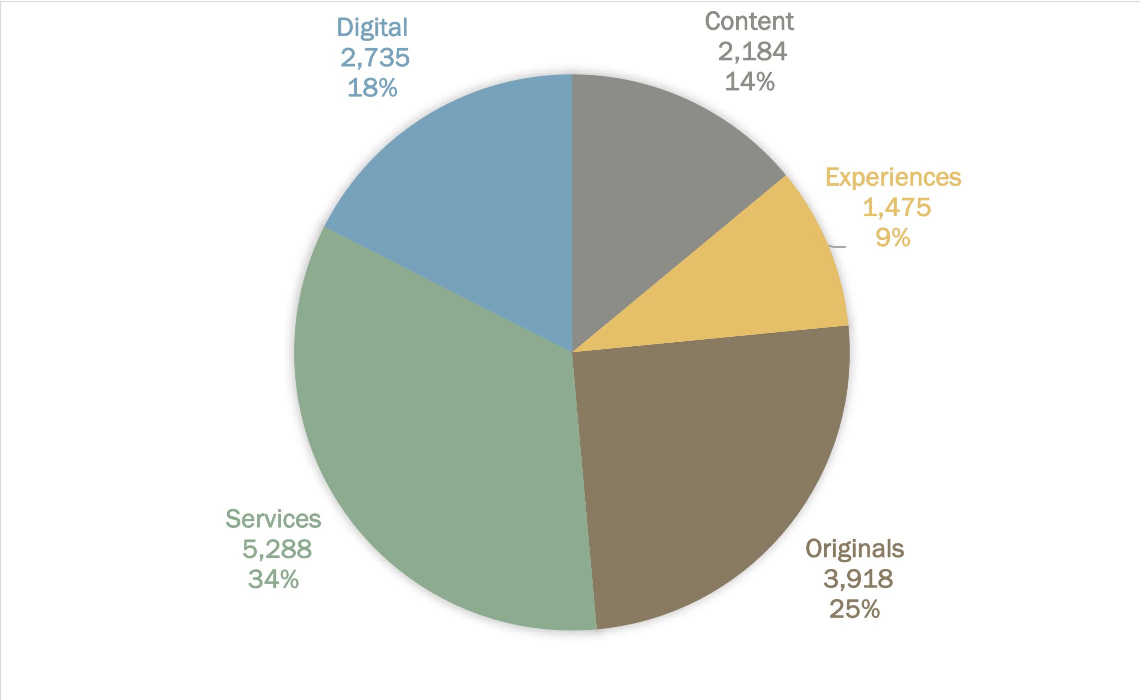
Again, we observe a smaller relative discrepancy in the larger geography. More significantly, LinkedIn is clearly capturing a freelance and self-employed workforce much larger than the total of those in full-time or part-time employment within the sector:

> ***Leicester's cultural and creative sectors draw upon a freelance workforce of some 20,000 within its travel to work area, of whom more than half are based within the city.***

3. Supply chain analysis

Analysis of LinkedIn workforce data by creative supply chain (see Figure 9, above, for definitions) gives a clearer impression of where employment is concentrated:

Figure 12 Creative workforce in Leicester (LinkedIn, November 2022) – n=*15,600*

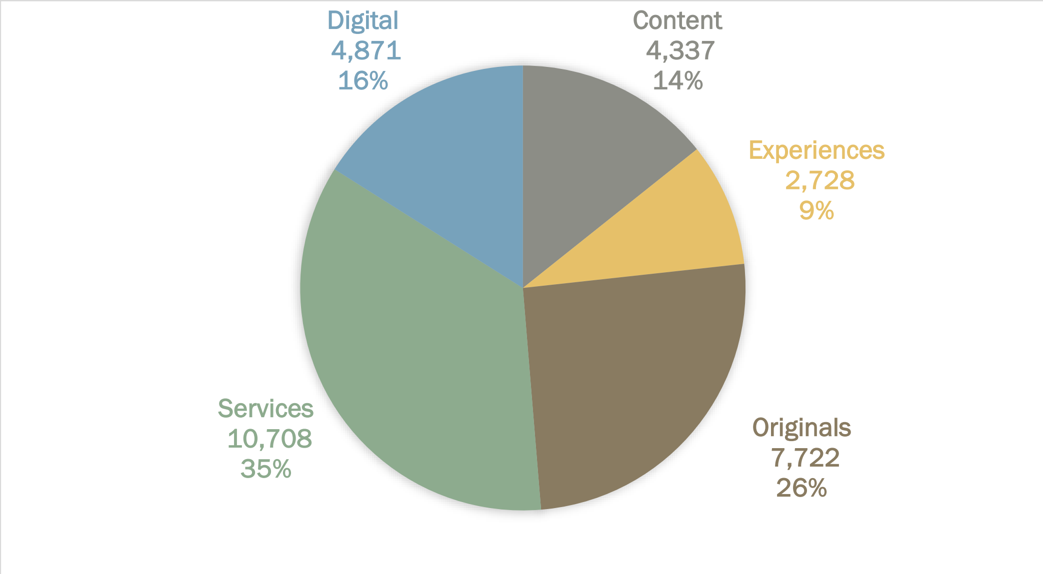


Source: Curator analysis of LinkedIn Data, November 2022

This contradicts the impression given by the BRES data that the content sectors – including Film, TV, Animation and Music – are growing in importance, and suggests that creative services (including Advertising and Marketing, Architecture, Design and Graphic Design) remain the most significant element of the creative workforce. It further suggests a continuing strength of 'making', denoted here by the Originals supply chain, which includes fashion design and manufacture of apparel.

A very similar proportion of employment within each supply chain is reflected in the figures for Leicester & Leicestershire LEP:

Figure 13 Creative workforce in Leicester & Leicestershire LEP area (LinkedIn, November 2022): n=*30,366*



Source: Curator analysis of LinkedIn Data, November 2022

4. Creative clusters

The *Creative Industries Radar* report (2020)[3] highlighted the fact that Leicester's creative enterprises demonstrated the highest propensity to be located within 'microclusters' of any city the top 20 TTWA areas in the UK, with 84% of the total population of creative businesses being located one of six microclusters, each of 50 or more creative businesses. That finding:

- correlates with the scale and significance of the freelance workforce across the county, and
- emphasises the importance of measures to support freelance working in any intervention to grow the cluster and individual businesses within it.

It is also reflected in our mapping of Leicester's CCI businesses using Beauhurst data, which shows the concentration of firms within city centre wards.

[3] Siepel, J. et al (2020). Creative Industries Radar: Mapping the UK's creative clusters and microclusters. Creative Industries Policy and Evidence Centre, Nesta, London.

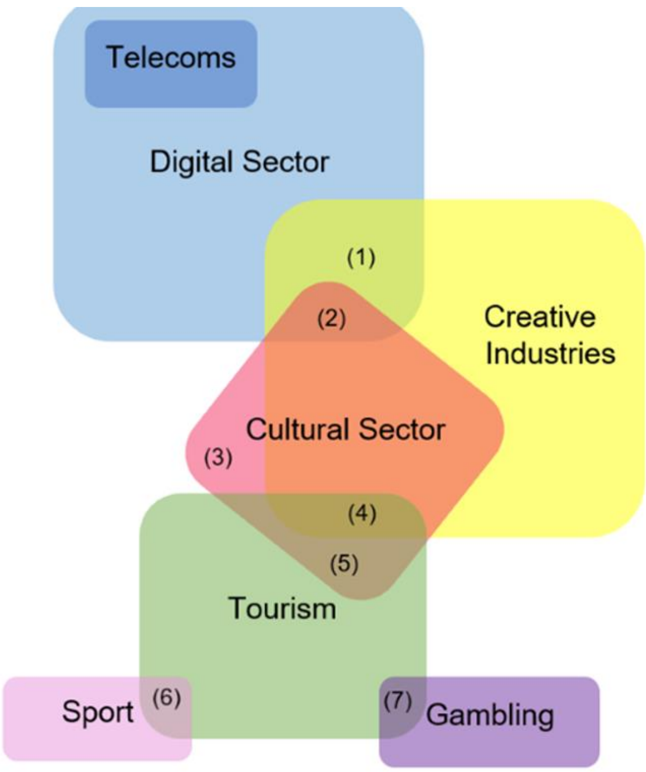
Appendix 1: DCMS sector definitions for cultural and creative industries

DCMS uses SIC codes (Standard Industrial Classifications, denoting the industry with which a company identifies itself) as the basis of a definition of cultural and creative industries.

Overlaps in the sector definitions

As Figure 14 shows, there is significant overlap between the cultural sector, creative industries and the digital sector in this definition.

Figure 14 DCMS sector definitions and overlaps



(1) Publishing, computer games, software publishing, computer programming, computer consultancy activities
(2) Film, TV, Music, Radio
(3) Heritage, retail of music and video recordings, manufacture of musical instruments, reproduction of recorded media
(4) Arts, Museum activities
(5) Heritage
(6) Renting of sports goods, operation of sports facilities, other sport activities
(7) Gambling

Note: Civil Society has not been depicted in this figure because it spans across all industries, both within DCMS sectors and outside. The overlap between Civil Society and other DCMS sectors is taken into account for All DCMS totals (mainly SIC 90 – Arts, which overlaps with Creative Industries, Cultural Sector and Tourism sector).

Source: DCMS Economic Estimates

Digital sectors

This report focuses on cultural and creative industries. This means it measures those parts of the digital sector in which the 'creative' element – software development – is the key element. SIC codes age rapidly – the codes used as the basis of ONS sampling were last updated in 2007 – and do not, therefore, closely mirror changes in a fast-moving industry like software development. AI, cyber security, fintech and other industries have all grown rapidly since 2007 but there is no way to describe them accurately by SIC codes. Therefore, some of the companies included in creative industries may be addressing other, non-creative market verticals. We have to understand that some of the individuals within the workforce will move between 'creative' and 'non-creative' sectors and accept that the SIC codes at least give a standard of comparison by which we can examine trends and compare the scale and composition of Leicester's creative sectors with other cities in equivalent terms.

Industry groupings

For this study we have a list of industry groupings which relate to SIC codes as shown below:

Table 1 Industry groupings

Industry grouping	SIC code
Advertising and Marketing	7021 : Public relations and communication activities
	7311 : Advertising agencies
	7312 : Media representation
Architecture	71111 : Architectural activities
	71112 : Urban planning and landscape architectural activities
Arts	9001 : Performing arts
	9002 : Support activities to performing arts
	9003 : Artistic creation
	9004 : Operation of arts facilities
Crafts	3212 : Manufacture of jewellery and related articles
Cultural education	8552 : Cultural education
Design	7410 : Specialised design activities
Film, television and music	5911 : Motion picture, video and television programme production activities
	5912 : Motion picture, video and television programme post-production activities
	5913 : Motion picture, video and television programme distribution activities
	5914 : Motion picture projection activities
	6020 : Television programming and broadcasting activities
	5920 : Sound recording and music publishing activities
	18201 : Reproduction of recorded media
	18202 : Reproduction of video recording
	18203 : Reproduction of computer media
	3220 : Manufacture of musical instruments
	4763 : Retail sale of music and video recordings in specialised stores
Radio	6010 : Radio broadcasting
Computer games	5821 : Publishing of computer games
	62011 : Ready-made interactive leisure and entertainment software development

Other IT, software and computer services	5829 : Other software publishing 62012 : Business and domestic software development 6202 : Computer consultancy activities
Photography	74201 : Portrait photographic activities 74202 : Other specialist photography (not including portrait photography) 74203 : Film processing 74209 : Other photographic activities (not including portrait and other specialist photography and film processing) n.e.c.
Publishing	5811 : Book publishing 5812 : Publishing of directories and mailing lists 5813 : Publishing of newspapers 58141 : Publishing of learned journals 58142 : Publishing of consumer, business and professional journals and periodicals 5819 : Other publishing activities 7430 : Translation and interpretation activities
Crafts	3212 : Manufacture of jewellery and related articles
Music, performing and visual arts	8552 : Cultural education 9001 : Performing arts 9002 : Support activities to performing arts 9003 : Artistic creation 9004 : Operation of arts facilities
Libraries and archives	91011 : Library activities 91012 : Archive activities
Museums and galleries	9102 : Museum activities
Heritage	9103 : Operation of historical sites and buildings and similar visitor attractions

Appendix 2: BRES data for Leicester and Leicestershire CCI

Table 2: BRES data for Leicester and Leicestershire CCI

Leicester CCI	**2015**	**2020**	**2021**	**2022**
Advertising and marketing	315	435	225	230
Architecture	385	440	125	155
Crafts	10	5	15	15
Design	600	400	400	375
Film, television, video, radio and photography	230	305	565	410
IT, software and computer services	1,535	3,260	1,945	2,705
Publishing	190	160	260	280
Museums, libraries and galleries	260	75	320	215
Music, performing and visual arts	345	200	460	650
Total	**3,870**	**5,280**	**4,315**	**5,035**
Culture not elsewhere classified	40	15	15	35
Computer games	5	85	40	25
Software development	280	675	530	805
Computer consultancy	1,250	2,500	1,375	1,875
Culture and creative industries as % of all employment	2.3%	3.3%	2.6%	2.9%

Leicestershire CCI	**2015**	**2020**	**2021**	**2022**
Advertising and marketing	500	930	390	535
Architecture	450	870	600	830
Crafts	5	5	15	20
Design	1,000	850	700	650
Film, television, video, radio and photography	230	305	565	410
IT, software and computer services	3,720	6,115	3,560	4,940
Publishing	315	295	630	170
Museums, libraries and galleries	440	510	535	280
Music, performing and visual arts	275	110	285	395
Total	**6,935**	**9,990**	**7,280**	**8,230**
Culture not elsewhere classified	80	55	65	45
Production services	10	20	20	10
Computer games	15	25	25	30
Software development	1,330	2,340	1,660	2,160
Computer consultancy	2,375	3,750	1,875	2,750
Culture and creative industries as % of all employment	2.4%	3.2%	2.3%	2.5%

Appendix 3: IDBR data for Leicester CCI businesses

Table 3 BRES data for Leicester CCI businesses

DCMS Creative Industries sector	**2015**	**2020**	**2021**	**2022**	**2023**
Advertising and Marketing	70	60	60	75	65
Architecture	45	45	50	50	50
Crafts	10	10	10	10	10
Design	95	90	100	95	95
Film, television, video, radio and photogra	50	50	50	80	90
IT, software and computer services	355	595	550	470	405
Publishing	30	35	35	35	35
Museums, libraries and galleries	25	10	5	5	5
Music, visual and performing arts	55	75	75	75	75
Totals	**765**	**985**	**955**	**890**	**830**

Source: The Fifth Sector analysis of ONS data via Nomisweb, January 2024

Appendix 4: Beauhurst data for Leicester CCI businesses

Table 4 Beauhurst data for Leicester CCI businesses

Creative industries	**Beauhurst 2024**	**IDBR 2023**	**% difference**
Advertising and marketing	185	65	185%
Architecture	55	50	10%
Crafts	0	10	-100%
Design	135	95	42%
Film, television, video, radio and photography	210	90	133%
IT, software and computer services	590	405	46%
Publishing	60	35	71%
Museums, libraries and galleries	5	5	0%
Music, performing and visual arts	170	75	127%
	1415	**830**	70%

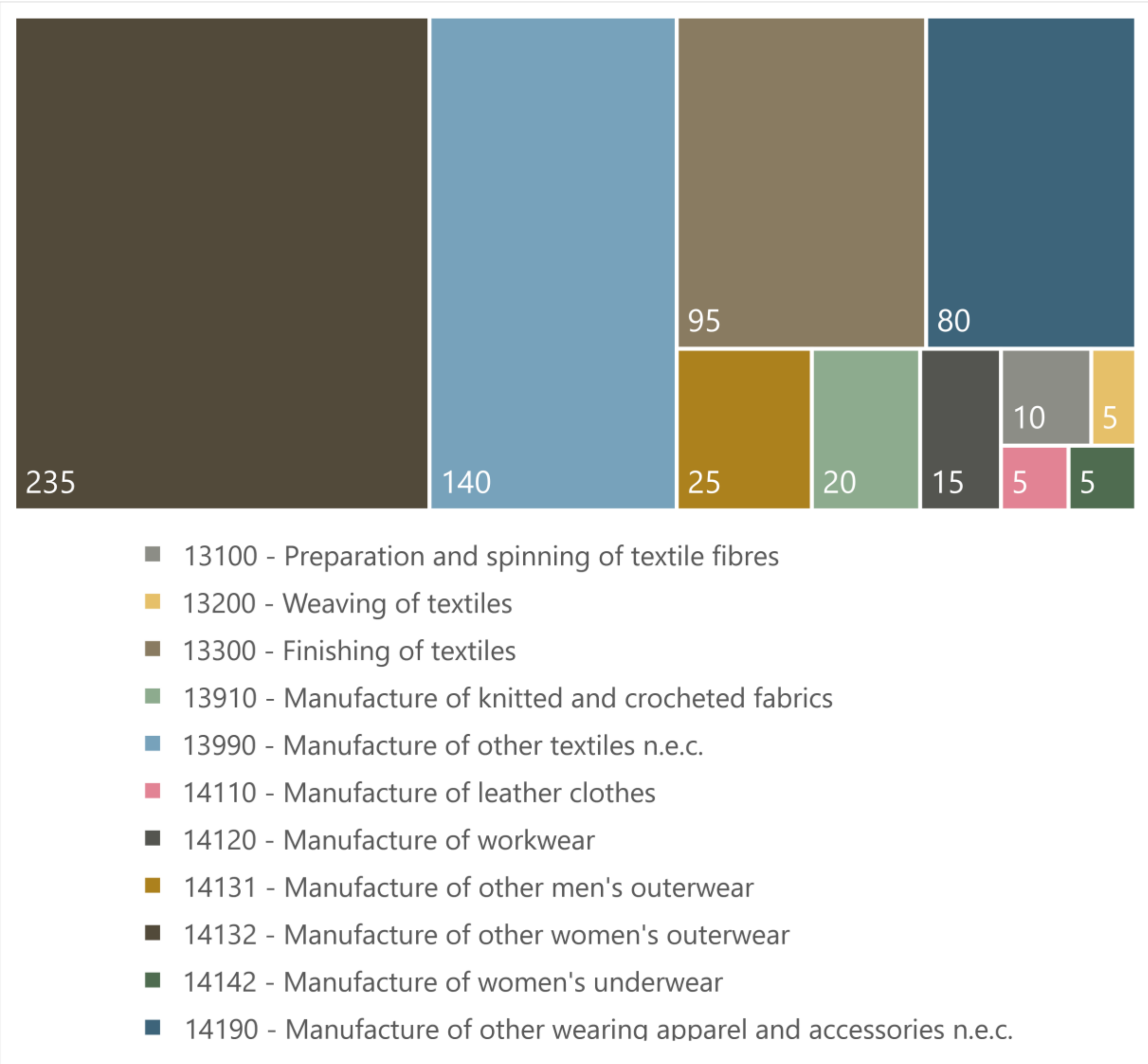
Appendix 5: Textile and fashion manufacturing

There are 645 active businesses in textile processing and apparel manufacture, as represented in Figure 15. The largest sub-sectors of this industry are:

- 14132 - Manufacture of other women's outerwear – 235 companies
- 13990 - Manufacture of other textiles n.e.c.- 140 companies
- 13300 - Finishing of textiles – 95 companies
- 14190 - Manufacture of other wearing apparel and accessories n.e.c. – 80 companies

We will be carrying out further analysis to establish supply chain relationship between fashion design and manufacturing in Leicester.

Figure 15 Textile processing and apparel manufacturing - count of businesses



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