



The Scottish
Government

Creative Industries,
Creative Workers and
the Creative Economy:
a Review of Selected
Recent Literature

Arts and Culture



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**CREATIVE INDUSTRIES, CREATIVE WORKERS AND
THE CREATIVE ECONOMY: A REVIEW OF
SELECTED RECENT LITERATURE**

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1 EXECUTIVE SUMMARY

- 1.1 The creative industries have been identified by the Scottish Government as one of six key sectors because of their potential to contribute to the Government's overall purpose of sustainable economic growth.
- 1.2 Available statistical data on the creative industries provides estimates of the turnover, employment levels, enterprise structure and contributions of the creative industries in Scotland.
- 1.3 The purpose of this paper was to undertake a brief review of the themes emerging from selected recent literature to inform a more detailed understanding of the creative industries, primarily by considering the experiences of those working in the sector. By reflecting on ways of measuring, analysing and researching the creative industries, the paper also discusses possible ways of engaging with this sector and those working in it.
- 1.4 This paper was undertaken in a limited time period and briefly reviewed the selected recent research evidence. It does not represent a comprehensive literature review, however it does highlight the key themes found in the existing research and areas worthy of further consideration.
- 1.5 This review has found that the analysis of the official statistics, based on the DCMS 13 definition, only takes our understanding of the sector so far due to the limited definition and scope of the sector that can be captured using national statistics standard industrial classification codes (which classify businesses by what they produce or the type of activity in which they are mainly engaged in).
- 1.6 The standard industrial classification based approach used to analyse the creative industries captures economic activity in the industries rather than by occupation. There are creative employees working in sectors outwith the creative industries (e.g. fashion designers working in the retail trade) and there are employees working in creative industries who do not have creative roles. The sampling frame for business surveys does not include enterprises not registered for VAT/PAYE and hence estimates of the level of economic activity may be partially underestimated. Analysis using an occupational classification of employment recorded in household surveys, such as the Labour Force Survey (LFS), can be used to provide information on employment in creative roles. The LFS will include coverage of all employment, even where individuals are employed in very small businesses (that are not registered for VAT/PAYE), but the LFS does not provide estimates of output from business.
- 1.7 This highlights the importance of formulating a definition of the creative sector that is relevant to the context in which it is to be applied and which enables analysis to consider what is of interest to a particular policy setting. To this end, some research suggests that approaches based on the wider concept of creative economy (which includes the creative industries) may be able to overcome some of the limitations found in an approach based purely on the creative industries. These approaches still require further development and have arisen from the UN's 2008 report on the Creative Economy.

- 1.8 Creative industries are characterised by small businesses, self-employment, informal hiring and project-based work with networks playing a key role in working relationships. As a result, the value of the creative industries lies in both the creative output of individuals and the organisations with which they are connected. The trend towards small business formation and the desire of creative individuals to produce unique content means that self-employment is especially relevant to this sector as when organisations grow, employees tend to break away to work independently to retain their creative freedom.
- 1.9 Although growth in the creative industries appears to be driven by new start-up businesses, one of the issues for the sector that emerges from the research is that growth in the medium-term can be slow. This has been attributed to the challenges that those working in the sector face around strategic development, business planning and financial management – all of which are closely linked to the notion that for many creative entrepreneurs, their enterprises are ‘lifestyle businesses’. The challenge for the sector and those who engage with it is how to encourage longer-term growth of these small lifestyle businesses.
- 1.10 It is recognised that there are limitations to identifying creative workers due to their diversity. Research with these individuals about their identities, motivations and their working patterns suggests that the way that this sector works is different to other sectors and that ways of working in the creative industries are commonly presented as a new way of doing business in knowledge and information economies. One of the challenges is to move away from traditional (i.e. industrial) understandings of work, learning and training to consider and respond to the diverse needs and practices of creative workers to encourage different ways of organising and growing the creative sector.

2 BACKGROUND

2.1 The Scottish Government's Economic Strategy (2007) states that 'some sectors and firms offer the opportunity to strengthen Scotland's areas of international comparative advantage, through achieving critical mass and boosting productivity'. The creative industries have been identified as one of six key sectors (alongside public sector dominated industries, like healthcare and education) that are well placed to contribute to the Government's overall purpose of increasing sustainable economic growth.

2.2 Although debates about the definition of the creative industries continue, these industries have been defined by the UK Department of Culture, Media and Sport (DCMS & CITF, 1998: 3) 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.

2.3 The creative industries comprise a diverse and loose range of activities/businesses that cannot be easily defined using standard industrial codes (Power 2002), although content and symbolic value appear to play a key role. The UK DCMS has developed an approach that takes pre-specified proportions of the relevant industry groups and in practice, the above definition has been used to refer to 13 specific industries¹ (Scottish Government, 2009). The DCMS definition forms the basis of the approach taken by the Scottish Government and Scottish Enterprise.

2.4 In Scotland, the Annual Business Inquiry (ABI) is used as the main source for employment and GVA (Gross Value Added) data on the creative industries. The main benefits of the ABI are that it covers most of the economy in terms of employment data, is comparable with UK data and also allows comparability with other sectors in the Scottish economy. It is recognised that the creative industries outlined in Annex 1 do not represent a fine tuned definition of the sector, however provide an approximate representation of the sector and allow changes to be tracked over time.

2.5 The Scottish Government's Creative Industries: Key Sector Report (Scottish Government, 2009) analyses the available statistics and provides some useful insights into this key sector. Analysis of the available data from the key sector report finds that:

- The creative industries in Scotland has an estimated turnover of £5.1 billion in 2007 and employed 60,700 people² (3% of Scotland's total employment).

¹ The industries covered in the DCMS 13 definition include advertising, architecture, arts and antiques, crafts, design, designer fashion, film, interactive leisure software, music, performing arts, publishing, software and computer services & TV and radio.

² Source: Annual Business Inquiry

- In 2008, there were 8,485 registered³ enterprises operating in the creative industries sector (or 5% of all registered businesses in Scotland) and the number of registered enterprises in the sector had increased by 27% over the last decade compared to 4% across all industries in Scotland.
- The analysis also found that the creative industries in Scotland are characterised by small businesses (97% of enterprises had 0-49 employees in 2008). If this category is broken down further, it shows that 60% of registered enterprises had zero employees, whilst 37% had 1-49 employees.
- In 2007, around one fifth of individuals in employment in the creative industries were estimated to be in self-employment, which was more than double the average for all industries across Scotland as a whole.⁴
- In 2007 the largest sub-sector in terms of both turnover and GVA was the computer games, software and electronic publishing sector, which accounted for 36% of Creative Industries turnover and 42% of GVA.

2.6 The approach used to monitor creative industries using national statistics draws attention to some of the limitations in the data on the creative industries (e.g. definition, coverage and differences with other sectors). A more in-depth examination of the characteristics of the creative industries, creative workers and creative economy is also useful in addition to the statistics presented above.

2.7 The purpose of this paper was to undertake a brief review of themes emerging from the existing evidence base to inform a more detailed understanding of the creative industries, primarily by considering the experiences of those working in the sector. The paper will also outline other ways of measuring, analysing and researching the creative industries to discuss possible ways of engaging with this sector and a brief overview of some of the policy interventions that other governments have made elsewhere. This paper does not, therefore, represent a comprehensive review of the available literature or an in-depth critique of the methods used.

³ Registered enterprises refers to those that are registered for VAT and/or PAYE. Therefore, the smallest companies that are not registered for either are not covered by these data.

⁴ Source: Labour Force Survey

3 DEVELOPING UNDERSTANDINGS OF THE CREATIVE INDUSTRIES SECTOR

3.1 The Scottish Government's Creative Industries: Key Sector Report analyses available statistical data on the creative industries and provides a useful insight into the economic contribution of the creative industries sector in Scotland. This analysis does, however, point to further areas of interest that could be useful in developing understandings of the creative industries. Therefore, this section takes as its starting point the themes emerging from the statistical analysis to consider the following:

- a) DCMS 13 definition of the creative industries
- b) Creative industries and small businesses
- c) Self-employment and the creative industries
- d) Foreign owned firms and the creative industries
- e) Perceived characteristics of creative workers
- f) Overview of the creative industries workforce
- g) Recruitment into the creative industries
- h) Networks
- i) Challenges experienced by creative workers

a) DCMS 13 definition of the creative industries

3.2 Current research suggests that understandings of the creative industries are largely based on the creative capacities of individuals and/or a categorisation of industry types (Holden 2007). The available statistical data is based on a categorisation of industry types and specifically focuses on the industries covered by the DCMS 13 definition. It is recognised that official statistics and the DCMS 13 definition that underpins them only take our understanding so far. For example, in some sectors such as design, it is not possible to identify all the constituent parts of the industry, whilst in designer fashion, there are no directly applicable codes in the Office for National Statistics Standard Industrial Classification (Creigh-Tyte 2005). However, the fast moving nature of the creative industries also poses a challenge for official statistics in keeping up with this sector (DCMS 2007), particularly in terms of definitions used to capture the sector.

3.3 It is also clear that the statistics only cover those employed in the industries covered by the DCMS definition. This in itself has two key limitations. The first is that not all of those involved in the creative industries produce creative content (Markusen *et al.* 2006), which can lead to over-counting of employment and GVA attributable to the creative industries through the use of available national statistics. Secondly, it is apparent that there are also individuals who are employed in creative jobs in businesses that are outside the creative industries (DCMS, January 2009). Research for NESTA (2008, National Endowment for Science, Technology and the Arts) found that this so-called 'embedded' creative employment in other sectors was greatest in manufacturing, real estate, business activities, wholesale and retail trade and financial intermediation (Higgs *et al.* 2008; Stam *et al.* 2008).

- 3.4 More generally, in terms of creative production, research by Holden (2007) emphasises a shift from traditional understandings based on the overlap between culture (namely publicly funded culture) and commercial activities to a three-pronged approach that includes publicly funded culture, commercial/market culture and social production (i.e. interaction with consumers/users of creative content). As a result, the motivation of creative workers and the spaces in which they engage are now unlikely to fall within either the subsidised or the commercial sphere and instead are more likely to span each of these three territories.
- 3.5 Creative individuals and organisations, have changed their working practices, career paths and business strategies as they become increasingly savvy about mixing their motives as well as their platforms (Holden, 2007: 15). As an example, people who spend much of their working lives in publicly funded culture are also generally employed on an ad hoc basis in the wider creative industries, whilst artists, in particular, are understood to move far more fluidly between sectors than had previously been thought in order to support their artistic development (Markusen 2006). This high degree of interaction between the three spheres forms a challenge in firstly, defining creative production and the creative industries and secondly, for policy, which has tended to treat each of the dimensions as separate realms.

b) Creative industries and small businesses

- 3.6 In terms of the scale of the sector and working with the creative industries definition outlined in Annex I, household survey data (labour force survey) shows that around a fifth of individuals in employment in creative industries in Scotland are self-employed, which is more than double the average for all industries across Scotland.
- 3.7 The literature confirms that the creative industries are largely formed of small-scale dynamic enterprises and although the statistics point to the prevalence of small businesses and freelance workers, individuals whose income falls beneath the VAT threshold tend not to be covered in business surveys.
- 3.8 The trend towards small business formation in the creative industries has also been explained in a way that focuses on the desire of individuals to create original creative content and to respond to emerging opportunities. Smaller organisations are perceived to be less bound by the replication of processes and are dynamic enough to respond to opportunities and to create new approaches. This can mean that when organisations grow, people tend to break off to form their own organisation, or undertake freelance work, to retain their creative freedom. This poses a challenge when thinking about this sector, as ideas of growth are sometimes assumed to be synonymous with larger organisations, whilst the instinct of those working in the sector is to stay small (Tims & Wright 2007; Lange *et al* 2008).

c) Self-employment and the creative industries

- 3.9 This prevalence of small businesses and freelance workers demonstrates the high levels of entrepreneurship evident amongst individuals working in the creative industries. DCMS analyses of the statistical data indicate that people working in the creative industries generally have a different attitude to risk and are more confident working for themselves and in setting up their own businesses (also found by Leadbeater & Oakley 2001).
- 3.10 Although entrepreneurship and the flexibility to respond to changing markets (e.g. through technological change) offers one explanation for the high degree of self-employment and freelance work, the research also illustrates that creative workers see less of a division between personal and work lives (though this could be a feature of self-employment in general). For creative workers, culture does not equal leisure, or time out, but instead culture is one of the inputs to the uniqueness of their work and acts a constant source of creative stimulation and fulfilment, even when people are not conscious of it (Holden 2007: 28; Lange *et al* 2008).
- 3.11 It has been suggested that many of those who are self-employed, like those working more generally in the creative industries, set up 'lifestyle businesses' (DCMS 2007). Growth in the creative industries is understood to be driven by new start-up businesses, although one of the issues for the sector is that growth after the first year is often slow, which relates to issues around business planning, finance, management skills and the extent to which these businesses are lifestyle businesses. As a result, working patterns for creative workers are generally less structured with flexible, freelance, ad hoc project work and part-time working common (Holden 2007).
- 3.12 In response to this way of working in the creative industries and the little differentiation made between work and private space, projects bringing housing and the workplace back together have been tested in locations such as the Cube in Sheffield, South Yorkshire. The Cube has sought to provide affordable accommodation and business space under one roof (McCarthy 2008). The approach is seen to bring benefits to small businesses and freelancers as it offers small amounts of office space and uses fewer resources by running one property rather than two (i.e. home and the office). The concept also seeks to bring small businesses together to aid collaboration; although the literature reviewed does not include an assessment of economic benefit. The development of central sites could work in Scotland's urban centres, however the sector is widely dispersed with activities spread across rural areas in the Highlands and Islands. Joint work/life spaces are not, however, evident in all places and research in the Netherlands, for example, has found that the small distances between cities means that creative workers tend to live in a location that is different to where they work (Stam *et al* 2008).

d) Foreign owned firms and the creative industries

- 3.13 The Scottish Government's Creative Industries: Key Sector Report and DCMS' research as part of their Creative Economy Programme highlight the role of

foreign-owned firms, which is especially interesting given the tendency towards small and independent businesses.

3.14 Although small businesses accounted for the majority of enterprises, small firms (0-49 employees) accounted for just 36% of employment in the creative industries. In contrast, large firms (250+ employees) represented just 1% of enterprises in the sector yet accounted for 52% of employment in 2008 (Scottish Government, 2009). The majority of registered enterprises in the creative industries in Scotland were Scottish owned (97%), 2% of enterprises had ownership based in the rest of the UK, whilst foreign owned firms represented just 1% of enterprises, but accounted for 19% of employment. This trend of a small number of foreign owned businesses accounting for a greater proportion of total employment and turnover is also evident in the UK data. A more detailed understanding of why these firms have chosen to locate in Scotland, how they contribute to the creative industries in Scotland, how they engage with other firms/businesses in the sector (i.e. do they have a different experience of networks) is worthy of further investigation and could provide valuable insights into this part of the sector.

e) Perceived characteristics of creative workers

3.15 Richard Florida's theory of creativity suggests that creativity in the form of innovation (new ideas, technology and creative content), rather than technology, powers economic growth (i.e. cultural inputs yield economic outputs). Florida's approach has been widely critiqued – for example some have suggested that creative activity actually grows in a thriving economy rather than stimulating growth itself (Stam *et al* 2008). Florida proposes three factors in relation to the creative class, which are talent, technology and tolerance. Therefore, Florida's view of the creative class (i.e. including those in the creative industries) is that these individuals are technologically aware, meritocratic and talent-driven. This re-enforces perceptions that creative workers, in general (i.e. not only those working in the creative industries sector), are highly skilled, competitive and independent individuals (Oakley 2006; Holden 2007). Of interest to this review is the available evidence drawn from those working in the sector, which provides useful information on how these workers see themselves.

3.16 Richard Florida's thesis on tolerance in the creative class has led some researchers to consider the extent to which the creative industries are inclusive and accepting of minorities and minority points of view. This is based on the perception that creativity is both driven by and open to talent and is unlikely to be bound by prejudices such as race, gender or sexuality. This has led some to discuss how the development of the creative industries has been presented as a response to social exclusion by encouraging the participation of those from traditionally excluded groups (Oakley 2006: 262).

3.17 The focus on popular culture (e.g. video games/music), informal skills and low capital entry (DCMS 2007) has been used to suggest that this is a sector that everyone, regardless of background, could become involved in (Oakley 2006). This is particularly true given the role that consumers of some creative content currently play in the co-production of original creative material (e.g. through

online technologies). In reality, the dynamic nature, fluidity of the creative industries combined with the turnover of people and organisations and ideas can work to exclude those from non-traditional backgrounds. Therefore, for those without resources and social connections it is recognised that it is particularly difficult to keep up in the creative industries, which may result in greater inequality (Parker *et al.* 2006).

f) Overview of the creative industries workforce

- 3.18 The creative industries are understood to employ more highly skilled workers, whilst employees in the creative industries are more likely to be qualified to degree level (DCMS 2007). A sector profile of the creative and cultural skills workforce in Scotland illustrates that the gender balance of the creative industries workforce was 53% female (compared to 51% in other sectors) and that half of the people in employment were aged below 37, which was similar to the equivalent figure for all industries in Scotland. 37% of jobs were part-time compared to 31% in other sectors and the average weekly full-time wage for employees in the creative and cultural skills sector was £420 in 2007 which was 3% lower than the average across Scotland (Futureskills Scotland, 2007). UK data show that the proportion of men and women in the creative industries workforce is similar to that of the economy as a whole (55% male, 45% female), although high income earners in the creative industries are more likely to be male, white and have access to financial resources (Tims & Wright 2007). Some sectors have a higher proportion of part-time workers and where this is the case there is a greater representation of women (e.g. crafts). In contrast, in advertising, where there are higher levels of full time employment, 60% of the workforce are male.
- 3.19 Black and Minority Ethnic (BME) representation in the creative industries workforce remains low and in spite of perceptions that this a sector where potentially anyone can become involved, only 4.1% of the creative and cultural industry workforce in the UK was from an ethnic minority background (Leadbeater, 2005; Parker *et al.* 2006; Tims & Wright 2007) compared with 7% of the UK labour force as a whole. Research in London found that Asian creative businesses represented 6% of total employment in London's creative industries (Greater London Authority 2003; Smallbone *et al.* 2005), whilst a study of BME-led creative industry business for the London Development Agency (Respect 2004) also found considerable variation in representation between individual sub-sectors.
- 3.20 This research showed that BME business owners in design, music and media were more likely to be formally educated in the activities concerning their business. This indicates the importance of a BME graduate workforce among these 'creative entrepreneurs'. However, this was in contrast to architecture, where formal education pathways were required which was seen to contribute to lower levels of BME participation. Some have noted that this may be linked to the role of cultural background, as architecture for example, may not rely on the cultural background of an individual as much as say music where this is a key part of the process. BME employment was observed to be higher where barriers to entry were low and where only modest capital input was required (e.g. in crafts or new forms of media). In other sectors BME representation was

even lower and film production, for example, remains predominantly white - only 1 in 20 of the workforce is from a minority ethnic background (Greater London Authority 2003; Parker *et al.* 2006).

- 3.21 The evidence also points to a clear occupational skewing of BME employment and highlights the variety of work and employment situations which are found in the sub-sectors of the creative industries. For example, in the film industry, much BME employment is accounted for at the exhibition and distribution end of the value chain, whilst BME employees are less likely to hold more senior positions. In some areas, BME businesses can encounter considerable problems in breaking out of their ethnic market niches into more mainstream markets and the barriers identified can include a lack of acceptance in mainstream markets, resource constraints and lack of business skills (e.g. marketing) (Greater London Authority 2003).
- 3.22 It is also worth noting that there are challenges in estimating the numbers of BME businesses as some large scale business databases do not always contain information on the ethnicity of the business owner and of more relevance in terms of engaging with these businesses is that, in the case of Asian businesses in London, these individuals did not view their business as ethnic or Asian, but rather as an integral part of the industry (Greater London Authority 2003).

g) Recruitment into the creative industries

- 3.23 Much of the evidence base highlights how developing and sustaining effective networks in the sector can encourage ideas, expertise, innovation and complementary skills to be shared. Networks also have a role to play in the recruitment to jobs in the creative industries.
- 3.24 Recruitment in the creative industries can be insecure and is characterised by patterns of informal hiring, access to social networks and the absence of established career pathways (Oakley 2006; Currid 2007; Taylor & Littleton 2008). Access to work is often through less formal channels such as networks and connections (rather than job advertisements) and these individuals, particularly in the early stages of their careers, take on unpaid work to develop their skills and qualifications (i.e. people are expected to provide for their own training and development and often fall into the 'work experience, work for nothing culture') (Tims & Wright 2007). Therefore, it is common for individuals to take on a succession of different jobs, many of which are based on one-off short-term projects. Although some researchers have argued that this situation offers a model for future work (e.g. in knowledge and information economies), others point out that many creative workers experience limited job security and periods of unemployment, which require them to have sufficient financial and social resources to sustain themselves (Parker *et al.* 2006; Taylor & Littleton 2008).
- 3.25 These characteristics may reflect the fact that companies in the creative industries exhibit some employer market power (i.e. there are a few employers and a large pool of individuals competing to enter employment in the sector). The research also illustrates that an outcome of this type of working is that the

value of the creative industries tends to be in people and not the organisations that they work for (Tims & Wright 2007). More specifically, individuals are likely to be recruited for work on the basis of their last project, rather than their portfolio of experience.

h) Networks

- 3.26 Networking and the physical spaces and places associated with it are also seen to be vital for, entry into and advancement in, the creative industries. The focus has tended to be on creative workers as individuals and independent workers, however current research emphasises the importance of team working, networking, peer competition and co-operation (Holden 2007). Research by NESTA (2002) showed how creativity is a progressive, iterative process that is often undertaken collaboratively with others. Currid's research in New York with participants from the artistic and cultural sectors illustrated how the sharing of ideas to develop a product combined with questioning and exploring can all boost creativity (Ruiz 2004). More specifically in the context of the creative industries, companies are rarely the invention of a single individual, but depend on teams and networks to thrive (Oakley & Leadbeater 2001).
- 3.27 Social networks and interactions are recognised to be central to the industry (e.g. forums have been established to enable members to network and initiate commercial and creative collaborations i.e. through workshops that can facilitate the development of business skills) (Oakley 2006). The research provides many examples of types of creative infrastructure, which range from brands such as the Tate to sector focused infrastructure (e.g. the Dansk Design Centre in Denmark) and interdisciplinary infrastructure that combines strong brokerage, commissioning and networking functions with a strong element of user-led activity in mixed media cultural centres (e.g. defined by Florida as 'third places' – neither work nor social and often semi-public places such as galleries and cafes where information exchange can lead to job offers, collaboration in projects and potential financial resources) (Tims & Wright 2007; Lange *et al* 2008). Holden (2007) has also suggested a role for 'public funded creative intermediaries', which sees publicly funded cultural organisations acting as brokers bringing together practitioners from different sectors to help develop networks and practice (e.g. the Watershed, Bristol) (Holden 2007).
- 3.28 Networks are also integral to the clustering of particular types of sub-sectors in specific geographical locations. Turok's (2003) research considered the extent to which the concept of the clustering could be used to explain the structure of the film and television industry in Scotland industry and found that although localised networks of social interaction existed in this sub-sector, they revolved around acquaintance and support networks, rather than business or creative relationships (also evident in a study of BME creative industries in London, 2003).
- 3.29 In addition to the more supportive and collaborative elements of networks that much research has focused on, Shaw's (2006) research on small firm networks

in Scotland in the creative industries revealed complex patterns of networking, where networks and the contacts in them provided a source of information on competitors as well as enabling small firms to develop their client base and resources (especially when starting-up).

i) Challenges experienced by creative workers

- 3.30 The very strengths of the sector are also closely linked to some of the challenges that employees and employers in this sector face. Early research by NESTA (2002) derived from a survey of 164 NESTA awardees found that creative individuals perceive that they are hindered by a number of barriers. Many of the barriers that awardees identified were rooted in an insufficient understanding of the creative process and the value of creativity to culture and the economy, whilst others were embedded in the education system and wider society (Ruiz, 2004).
- 3.31 The main challenges identified by the sector are attracting appropriately trained staff, staff training/retention and rapid changes in technology. Skills can become outdated very quickly and old skills and niche markets need to be kept alive (Holden 2007: 28). In Scotland, 2% of workplaces in the creative and cultural skills sector reported skill shortages compared to 6% in other sectors and in comparison with other sectors, the percentage of employees in the sector who were not fully proficient was lower (4%) than in other sectors (6%) (Futureskills Scotland, 2007).
- 3.32 Other research has highlighted that although many of those entering the sector are graduates with a high-level of technical and creative skills gained through formal qualifications, employers have noted the challenge of developing 'softer' skills amongst these workers such as communication, team working and awareness of the context in which creative skills and knowledge can be applied (Raffo *et al.* 2000; Parker *et al.* 2006). This was also found by Futureskills Scotland (2007) in their Scottish sector profile of the creative and cultural industries, which noted that where a skills gap arose, employers reported weaknesses in 'softer' skills and technical and practical skills. More specifically, the skills gap most frequently referred to included customer handling skills, other technical and practical skills, problem solving, oral communication skills and team working.
- 3.33 When opportunities occur in the creative industries, they move very quickly allowing little time for structural or skills planning (Tims & Wright 2007). Research has found that small businesses in this sector are both less likely to provide training and that they also rarely take up formal business training and support. It has been argued that the skills and training system for the creative industries, especially for those seeking to enter the sector, need to be less formal (less focused on fixed qualifications frameworks), respond to real time needs and which enable learning in the world in which the creative industries work (Tims & Wright 2007). It has also been suggested that there is a need to create more space for structured innovation, thereby enabling local

partnerships of business, creative workers and the public sector to trial new approaches and learn what works at both the local and national level (Raffo *et al.* 2000; Parker *et al.* 2006).

3.34 In addition, a common observation of the creative industries is their lack of adoption of business models common in other sectors of the economy and NESTA (2007) found that many of those working in the sector lacked the strategic skills necessary for high and sustained growth, only 35% of creative businesses had specific financial goals for the future and less than two-thirds did not include these goals in a formal business plan. The extent to which business planning, for example, is potentially less common in the creative industries compared with other sectors would be worth further consideration.

4 OTHER WAYS OF MEASURING, ANALYSING AND RESEARCHING THE CREATIVE INDUSTRIES

- 4.1 It has already been noted that the DCMS 13 definition of the creative industries and statistical analyses only take our understanding so far for many of the reasons already highlighted in this paper. Statistical tools are only able to capture a limited picture primarily because current statistical categorisations can either provide information on standard industrial (what people produce/main activity) or standard occupational (what people do) classifications. For example, Markusen *et al.s* (2008) research showed that different approaches to measuring the creative industries illustrated how the creative economy in Boston varied in size from 1-49%⁵. It is also possible that some approaches could also be over-counting the sector. This example demonstrates how the choices made about which industries, firms and occupations to include in analytical approaches can affect understandings of the size and content of the creative economy.
- 4.2 Furthermore, broader definition such as that of the creative economy capture the creative activity that takes place in establishments whose primary classification is non-creative and therefore can be recorded under a different sector classifications. An example of this was cited by McRobbie (1998), whose research found that those creative practitioners unable to earn a living due to financial viability and recruitment in the creative industries, find themselves working in less creative roles in different types of company (e.g. young fashion designers working in retail). Although the Annual Business Inquiry is the main source of information on employment and GVA data in the creative industries in Scotland, it is recognised that the creative industries are not easily defined using the standard industrial classification (SIC) codes, and that the set outlined in Annex 1 do not represent a fine tuned definition of the sector.
- 4.3 The Inter-Departmental Business Register (IDBR) is understood to be the most comprehensive database available for UK firm statistics and covers 99% of business activity in the UK. Frontier Economics, commissioned by DCMS, as part of the Creative Economy Programme considered the issues linked to the IDBR (published by DCMS September 2007). The first was whether the definition of the creative industries could be updated following changes to the data available (5 digit standard industrial classification, SIC, data is available rather than the 4 digits used in current statistics). In measuring the creative industries, it is also important to understand which industries are driving performance and the role of multi-national firms in this growth.
- 4.4 One of the limitations of the IDBR is that some sub-sectors of the creative industries sector are not identifiable in the standard industrial classification code structure (e.g. computer games & design), which means that there is a lack of basic economic data due to the absence of SIC codes (Creigh-Tyte 2005). Changes to the SIC code structure (from 4 digits to 5 digits) have been announced by DCMS (August 2007), which should go some way towards

⁵ Markusen's (2008: 27) research explores two dimensions of the creative economy that have been used to assess employment in US regions – cultural industries and cultural occupations.

providing more meaningful data and this information is expected to be available from 2009/10. DCMS has also developed a supply chain approach to describe each industry based on five layers which could provide a more detailed understanding of the contributions that particular types of firm make and they also emphasise the value of undertaking more in-depth analysis of disaggregated data, rather than the aggregated statistics produced through the standard industrial classification.

- 4.5 It is also apparent that the role of the creative economy has gained increasing significance in EU and UN policy thinking. In 2008, the UN observed that there is no unique definition of the creative economy given that it is a subjective concept that is still being shaped. However, in developing its thinking in this area, the UN has adopted the United Nations Conference on Trade and Development definition of the creative economy (2008: 15⁶):

“The ‘creative economy’ is an evolving concept based on creative assets potentially generating economic growth and development. It can foster income generation, job creation and export earnings while promoting social inclusion, cultural diversity and human development. It embraces economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives. It is a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at macro and micro levels to the overall economy. It is a feasible development option calling for innovative, multi-disciplinary policy responses and international action.
At the heart of the creative economy are the creative industries.” [my emphasis]

- 4.6 In summary, the creative economy is seen to be ‘a leading *component* of economic growth, employment, trade, innovation and social cohesion in most advanced economies.’ This could be seen as especially important given that the UK is understood to have the largest creative sector in Europe and by GDP potentially the largest in the world. In the context of Creative Britain (January 2008), there may be opportunities for Scotland to lead on a policy approach that is based on the more holistic approach of the creative economy, rather than on the creative industries alone. Therefore, although approaches based on the concept of the creative economy are embedded in understandings of the creative industries, they have the potential to be broader than approaches focused only on the creative industries. In any shift to approaches based on the creative economy, it will be important to ensure that the multiple and often interchangeable (e.g. culture and creative) definitions used to describe the sector are clear and that a shared definition is reached that is relevant to the context.
- 4.7 NESTA’s 2006 report *Creating Growth*, offers a starting point in defining creative economy and comprises creative services, creative content, creative experiences and creative originals. In contrast to previous approaches a focus on the creative economy in this way could provide a more in-depth understanding of the sector as groupings are not based on market output (such as film, music), but on common business models. Secondly, a creative

⁶ For the definition of the creative economy adopted by the UN see the following link (page 39): http://www.unctad.org/en/docs/ditc20082cer_en.pdf

economy approach can overcome the preoccupation with individual sub-sectors and instead focus on the interventions that matter to the whole creative economy (e.g. talent, technology content & intellectual property rights) (also noted by the UN 2008). This approach also offers scope to overcome the boundaries that are understood to occur between the traditional performing arts and the creative industries.

- 4.8 Little comparative research has been undertaken on the scale of the creative economy across Europe, however evidence is available from Sweden, Denmark, Norway and Finland which have undertaken research and mapping studies (often annual) on the economy of the creative sector.
- 4.9 In terms of understanding this sector, one of the challenges for government is in reaching organisations that are micro, fluid and disaggregated and which are sometimes difficult to find and communicate with. The pace of change can make it a challenge for government to engage with them (Holden, 2007). As Tims & Wright (2007) observed, it is challenging to represent or consult with this sector given that, firstly, there are no adequate ways of aggregating the voices of the smaller interests who are likely to hold differing and diverse views and, secondly, there are currently no mechanisms currently in place to balance the views of smaller interests with those from larger and more visible interests.
- 4.10 Although the Nordic evidence is valuable, its primary focus is on understanding economic growth in the creative industries. Research emphasises the value of using a combination of methods to provide a richer understanding of this key sector and highlights the importance of timely data. Qualitative research undertaken elsewhere, involving focus groups and interviews, with those working in particular parts of the creative industries illustrates how the views, experiences and attitudes of those working in this sector can supplement the information available in the statistical and economic data. This paper has shown the importance of networks and brokers and identifying and engaging these in the Scotland context could provide a useful way of learning more about how the creative industries function in Scotland, especially in relation to the experiences of those producing cultural content.

Highlighting policy and practice elsewhere on the creative industries

- 4.11 Interest has been expressed in the approaches that other governments have taken to the creative industries and DCMS in their evidence review of the creative industries acknowledge the value of international research on what other countries are doing in terms of policy.
- 4.12 Much of the international evidence identified in this review was focused on the clustering of creative industries and wider cultural activities in particular places. This highlighted how the *natural* spatial concentration of particular sub-sectors of the creative industries can be found in particular places and illustrates how enterprises situated in clusters can exhibit high growth potential (note clusters are not unique to the creative industries and are found in other sectors).

- 4.13 Many of the examples referred to in the literature were city-based (e.g. New York⁷, Berlin⁸, Copenhagen⁹ and Manchester¹⁰) and they have been researched in relation to Florida's work on 'creative cities'. The concept of the creative city is closely linked to wider policy debates on urban regeneration and the potential of clusters to revive and position cities in a globalised economy (Turok 2003; Bayliss 2007).
- 4.14 The evidence demonstrated how businesses that have located to form clusters thrive on spatial proximity and the networks, collaboration, embedded knowledge and infrastructure found in particular places. It is also worth noting that enterprises located in clusters also grow because of their relationships and connections with businesses outside the cluster (i.e. they do not operate in geographical isolation Lange *et al* 2008). Therefore, the reputation of clusters and the cities and regions in which they are located matter as these places are seen to be distinctive for their innovation, productivity growth, comparative advantage and international competitiveness – all of which are seen to foster growth.
- 4.15 Turok's (2003) research with film and television industries in Scotland also highlighted that although cities matter, they do so because of the pool of creative/technical talent and their infrastructure rather than the industrial complexes or social networks. One of the challenges in maintaining clusters is in sustaining places where creative individuals can both live and work (i.e. clusters are both sites of production and consumption) (Currid 2007) and to maintain the resources and networks that support the cluster (e.g. infrastructure, resources, facilities) (Leadbeater & Oakley 2001).
- 4.16 Although some governments (central, regional and local) have sought to foster and steer creativity in particular places through Florida's concept of the 'creative city' (e.g. through place branding), observations on clustering and creative environments (including observations from Florida himself) emphasise the naturally occurring nature of clusters and do not provide a basis for government to try and create clusters or creative environments through policy interventions (Bayliss 2007; Stam *et al* 2008). Furthermore, policy responses to the 'creative city' concept have been criticised because of their marketing and urban planning approaches, which tend to present images of different cities in the same way (e.g. using the same language), rather than focusing on what makes them distinctive (Lange *et al* 2008). Other researchers have argued how rather than being inclusive and tolerant, the 'creative city' concept can be exclusive as local populations that are not creatively skilled or talented can find themselves marginalised and/or displaced.
- 4.17 In response to these criticisms, it has been argued that the role for policy in this arena is to provide favourable framework conditions for creativity (e.g. in Berlin and Copenhagen, through urban planning and the encouragement of loosely organised technological, economic and professional support networks tailored

⁷ For example, see Neff *et al* (2005); Currid (2007)

⁸ See for example, Lange *et al* (2008); Louekari (2006)

⁹ Bayliss (2007)

¹⁰ Berranger & Meldrum (2000)

to the sectors needs or in the case of the Netherlands in attracting and retaining talented individuals). In the context of Scotland, although the wider research has pointed to the concentration of the creative industries in urban environments, it could be worth exploring further the role that this sector play in rural locations. The evidence on this was mixed as Power's (2002) research in Sweden found that rural locations were significant areas of creative activity, whilst Stam *et al* (2008) found that in the Netherlands, creative industries in urban areas were more innovative and contributed more to economic growth than their rural counterparts.

- 4.18 Information from Scottish Enterprise suggests that they have changed their approach from one based on clusters to an industries approach and their focus is on digital media as this is understood to be where growth lies. It is understood that they are currently undertaking a baseline assessment of the digital industries and updating the mapping of Scotland's key strengths as part of the development of a digital media strategy. It would be useful to explore how this approach is different given their focus on Scotland.
- 4.19 Research on the creative industries in the Netherlands (Stam *et al* 2008) and Sweden (Power 2002) shows how the creative industries are very heterogeneous and that businesses in the different sub-sectors work in different ways and face different constraints even though they may be geographically located close together. Their research suggests that one policy to stimulate growth across the creative industries could be less effective than specific policies that are tailored to individual sub-sectors; although this could have financial implications as the cost of setting up and administering specific, targeted interventions may be higher than a one-size fits all approach.
- 4.20 Considerations or indeed evaluations of government-wide policy responses to the creative industries were less apparent in this summary review, although examples of approaches in New Zealand and Australia were uncovered. New Zealand has identified the creative industries as one of three industries that offer the greatest potential for economic growth (see New Zealand Growth and Innovation Framework. The other two sectors are ICT and biotechnology). Kaino (2007) highlights how the policies, combined with political support and cultural leadership for the creative industries (i.e. Prime Minister Helen Clark was Minister for Arts, Heritage and Culture and the Ministry worked closely with New Zealand Trade and Enterprise) have contributed to New Zealand's stronger economic growth in its film industry.
- 4.21 Since 1994, New Zealand has developed a government-wide approach to the creative industries and formed Creative New Zealand as its main instrument for developing policy and devolving funding. Creative New Zealand is the national agency for the development of the arts in New Zealand and the purpose of its work is 'to encourage, promote and support the arts in New Zealand for the benefit of all New Zealanders'¹¹. It seeks to do this by funding a wide range of projects by artists and arts organisations, advocating for the arts, and undertaking initiatives and research projects. Kaino's research also

¹¹ Creative New Zealand web page available at:
<http://www.creativenz.govt.nz/WhoWeAre/tabid/73/language/en-NZ/Default.aspx>

suggests evidence of the adoption of the creative city concept in New Zealand's approach (e.g. Wellington regional film industry cluster) and a close link between culture, creativity and national identity thereby creating a strong sense of cultural identity¹². The way in which Creative New Zealand works, in particular how its work moves beyond the arts to include the creative industries could be considered further as it was not clear from the research reviewed here.

4.22 Australia's response to the creative industries was to develop its first national cultural policy, Creative Nation (2006), which had a clear mandate to invest in cultural industries in a way that could respond to globalising forces, especially in communications. In contrast to New Zealand, Kaino has noted that there is little evidence to suggest that the creative industries receive the same level of attention at Federal policy level. The success of New Zealand's approach to the creative industries, particularly in the film industry, appears to be underpinned by infrastructural support and long-term development strategies.

4.23 In contrast to the other international examples referred to, countries such as Portugal, are still to open up the debate on the development of national priorities and policies on culture and creativity (Costa *et al* 2008).

4.24 It is clear from the limited evidence reviewed here that a more in-depth consideration of the policy responses taken by governments to the creative industries could be beneficial in identifying whether there are any common themes or good practice approaches.

¹² For example, the 2006 Budget documents for New Zealand announced a national identity theme focus where 'all New Zealanders [will] be able to take pride in who and what we are through our arts, culture, film, sports and music, and our appreciation of our natural environment, our understanding of our history and our stance on international issues' (Ministry for Culture and Heritage 2006, pg 37 cited by Kaino 2007).

5 CONCLUSION

- 5.1 The creative industries have been identified by the Scottish Government as one of six key sectors because of their potential to contribute to the Government's purpose of sustainable economic growth. It is recognised that the creative industries comprise a diverse range of activities though they have been defined by the UK DCMS to refer to 13 specific industries. The Scottish Government's Creative Industries: Key Sector Report offers an economic overview of the creative industries sector and the recent growth in the sector. Of interest to this paper was a consideration of what the research literature could shed light on in terms of developing our understandings of those who work in, and engage with, the sector.
- 5.2 The analysis of the official statistics, based on the DCMS 13 definition, and this brief review of the themes coming out of the existing evidence demonstrate that this approach only takes our understanding of the sector so far due to the limited definition and scope of the sector that can be captured using national statistics SIC codes. It also illustrates the limitations around both the use of the DCMS 13 definition and what types of information are currently available in the statistics. The challenges of SIC codes and definition are not just limited to the UK, but has been commented on by researchers working in other countries. This highlights the importance of formulating a definition of the creative sector that is relevant to the context (in this case Scotland) and which enables analysis to consider what is of interest in a particular policy setting.
- 5.3 Some research suggests that broader approaches based on the idea of the creative economy may be able to overcome some of the limitations found in the creative industries approach, however these approaches are still being developed (for example by the UN). It is also possible that if the creative economy is not clearly defined, it could lead to double counting across other sectors in the economy, could result in a loss of comparability with other sectors in the economy and the reduced possibility of being able to make comparisons with other economies (e.g. UK).
- 5.4 The available evidence has confirmed that the creative industries are characterised by small businesses, self-employment, informal hiring and project-based work with social networks playing a key role in this process. This trend towards small business formation and the desire of creative individuals to create original content can mean that self-employment is particularly relevant to the creative industries, especially as when organisations grow, people tend to break off to work independently to retain their creative freedom. Therefore, the value of the creative industries lies in both output from individuals and organisations.
- 5.5 Similarly, although the creative industries are widely seen to be a growth sector in many western economies, those working in the sector continue to report evidence of a skills gap (especially in soft generic skills) and barriers to growth (developing strategic priorities, financial management and business planning). Further research could provide information on how these barriers could be overcome, especially for new start-up and lifestyle businesses, and could

release their potential for further growth through profitable commercial opportunities.

- 5.6 Although there are clearly limitations to identifying creative workers (i.e. they are not an homogenous group), research with these individuals about their perceptions, identities and their working patterns emphasises that the ways of working in the creative industries are different to other sectors of the economy and that it is commonly presented as a new way of doing business. However, in spite of this many of the policy interventions introduced to support the creative industries are often focused on more traditional understandings of work and learning and current research emphasises the potential to develop new types of policy intervention that recognises the sophistication of creative people and practices and which can lead to different ways of organising and growing this sector (Tims & Wright 2007). Some of the policy interventions that have been referred to in the evidence include support in the form of skills development, infrastructure development, brokering access to stakeholders./networks and the encouragement of self-organised/governing networks (e.g. Create Berlin – an initiative both by and for Berlin designers, Lange *et al* 2008). There is limited analysis on the effectiveness of such interventions.
- 5.7 The report has drawn out some important pieces of knowledge that can help better understand the nature of the creative industries, workers and economy from a policy perspective, such as the findings about small creative businesses not always having the commercial and financial skills to develop commercial opportunities.

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7 ANNEX 1

CREATIVE INDUSTRIES

DESCRIPTION

The creative industries are those industries that are based on individual creativity, skill and talent. They also include industries that have the potential to create wealth and jobs through developing intellectual property.

APPROACH TO MEASUREMENT

Creative industries can not be easily defined using standard industrial codes; however the UK Department for Culture Media and Sport (DCMS) have developed a measure that takes pre-specified proportions of the relevant industry groups. DCMS have discussed reviewing this measure. Future changes to the DCMS definition may impact on the approach outlined below.

Creative Industries SIC codes

Proportion of SIC used

<u>Sector</u>	<u>Standard Industrial Classification (SIC)</u>	<u>%</u>
Advertising	74.4 advertising	100
Architecture	74.2 architectural	25
Art/antiques trade	52.48/9 retail sale in specialised stores nec (+)	5
	52.5 retail sale of second/hand goods in stores (+)	5
Crafts	<i>majority of businesses too small to be picked in business surveys</i>	
Design	<i>no codes match this field</i>	
Designer fashion	9 subsectors clothing manufacture (+)	0.5
	74.87 other business activities nec (+)	2.5
Video, film, music & photography	22.32 reproduction of video recording (+)	25
	92.11 motion picture and video production	100
	92.12 motion picture and video distribution	100
	92.13 motion picture projection	100
	74.81 photographic activities (+)	25
Music and the visual and performing arts	22.14 publishing of sound recordings	100
	22.31 reproduction of sound recording (+)	25
	92.31 artistic & literary creation & interpretation	100
	92.32 operation of arts facilities	100
	92.34 other entertainment activities nec (+)	50
	92.72 other recreational activities nec (+)	25
Publishing	22.11 publishing of books	100
	22.12 publishing of newspapers	100
	22.13 publishing of journals & periodicals	100
	22.15 other publishing (+)	50
	92.4 news agency activities	100
Computer games, software, electronic publishing	22.33 reproduction of computer media (+)	25
	72.21 Software publishing	100
	72.22 Other software consultancy and supply	100
Radio and TV	92.2 radio & television activities	100

+ denotes that a proportion of this industry group is included to estimate the creative element

17.71,17.72, 18.10, 18.21, 18.22, 18.23, 18.24, 18.30, 19.30 these codes cover manufacture of clothes and footwear, within which are designer fashion activities (+)

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