

# MAPPING THE CREATIVE INDUSTRIES: A TOOLKIT





# MAPPING THE CREATIVE INDUSTRIES: A TOOLKIT

by BOP Consulting

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**Author: BOP Consulting/**

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**Editors/**

Pablo Rosselló  
Shelagh Wright

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# PREFACE

In our interdependent contemporary world at the start of the 21st century we face complex challenges, polarisation and inequality within and between nations. Development strategies are needed to unleash the creative potential of all to respond to the far-reaching cultural, economic, social and technological shifts that we are living through. In this context the concept of 'the creative and cultural economy' is growing around the globe as the interface between culture, economics and technology. Our world is increasingly dominated by images, sounds, symbols and ideas that are creating new jobs, wealth and new culture. The UK has been a leader in the development of this agenda, not just as a driver of the economy but also promoting social inclusion, diversity and development. No-one can claim a monopoly on wisdom as innovative creative people all over the world are changing the way we make and exchange goods, services and culture. This booklet (and the series it is part of) is a contribution to our shared knowledge and expertise for this emergent and valuable sector. We hope you find it both stimulating and useful.

**Shelagh Wright**

Advisor, Creative and Cultural Economy Programme

**British Council**

The British Council is committed to working in partnership to help shape the contours of our shared creative and cultural economy through its values of equity, freedom of expression, mutuality and sustainability.



# 1/ MAPPING THE CREATIVE INDUSTRIES

The products of the creative industries pervade contemporary life. Watching television, going to the cinema, reading newspapers, listening to music, playing computer games or socialising online occupy many of the waking hours of the world's citizens. This is not simply confined to the old industrial heartlands of Europe and the United States: from the telenovelas of Latin America and Bollywood films to the design flair of Korea's Samsung, the creative industries are a global phenomenon. Yet 15 years ago, the term 'creative industries' was barely known. How, then, can this phenomenon be understood and its economic value quantified?

One method that has been developed to help countries, regions or cities start thinking about the value of the creative industries is 'mapping'. Pioneered in Britain in the late 1990s, mapping extends well beyond the production of actual maps. It is shorthand for a whole series of analytic methods for collecting and presenting information on the range and scope of the creative industries. Mapping is intended especially to give an overview of the industries' economic value, particularly in places where relatively little is known about them. This toolkit explores the practicalities of using such methods. The toolkit draws on the experience of the British Council and its consultants to set out the seven steps of a successful creative industries mapping project.

Thinking the steps through at this stage will help researchers and other interested parties understand the challenges they are likely to face. This report also briefly discusses the place of the creative industries within broader economic and historical contexts. If you would like to explore the feasibility of a mapping project in more depth, lists of suggested further reading and organisations which can provide more information are provided in section 4.

## 1.1 Introduction

The desire to create things whose value is not purely practical – things that are beautiful, that communicate cultural value through music, drama, entertainment and the visual arts, or that communicate social position through style and fashion – is as old as human society itself. There have always been, and always will be, people with the imagination and talent to make and do these things. Their products and services are said to have an 'expressive value', a cultural significance that may bear little relationship to how much they cost to make.

In the twentieth century, these ancient traditions of cultural work – designing, making, decorating and performing – began to be woven together with a range of modern economic activities such as advertising, design, fashion and moving image media to create new forms of commercial culture. In

the first decade of this new century these developments have been hugely amplified by the power and reach of digital technology.

The industries responsible for these products are a varied bunch, yet they have certain things in common. Such industries earn their profits from the creative skills of their workforce and the generation of intellectual property (IP), and collectively have come to be known as the creative industries. Intellectual property law is the catalyst that transforms creative activity into creative industry. It protects the creator's ownership of ideas in the same way that other laws protect the right to the ownership of goods, land or buildings. It allows the inventors of new products and processes to benefit from their creativity by providing a framework within which they can work. It also enables them to make choices about what they protect and what they choose to give away.

The creative industries do not, however, operate in isolation. They sit at the centre of a web of connections with other industrial sectors, and are a source of innovation for the wider economy, particularly through design, branding and advertising. They also have an important role to play in urban regeneration and community cohesion. This wider web is often referred to as the creative economy.

The terms 'creative industries' and 'creative economy' are both relatively new and do not yet have fully settled definitions. Sometimes they are used interchangeably, sometimes they refer to related but separate concepts.

This toolkit uses the term 'creative industries' for the sake of simplicity,

as it is the activity of these industries which is being measured here. These days, though, 'creative economy' is probably the more widely used term. In any case it is likely that each country or region will adapt the creative industries/economy concept to suit its own needs. It should also be noted that some organisations, such as the European Union and UNESCO, have generally favoured an older term, the 'cultural industries'. There is a substantial academic literature debating the finer points of these distinctions<sup>1</sup>, and people should be aware that the terminology used in this toolkit is not uncontroversial.

However, this toolkit is intended to be a practical guide to mapping – one that explores how to do it, which approach would be best in any given context, and how to maximise the policy impact of the work. It aims to help researchers, policymakers and creative practitioners to understand the creative industries better by setting out ways in which evidence can be gathered. It draws on both the UK's experience and a number of mapping projects from around the world that have been supported by the British Council's Creative Economy Unit. To help make sense of the process of running a successful creative industries project, the toolkit sets out seven steps which need to be considered.

**Section 3 of the toolkit addresses each of these seven steps in turn, illustrated by case studies.**

**Notes/**

**1.** See, for instance, Flew, T. and Cunningham, S. (2010) Creative Industries After the First Decade of Debate, *The Information Society*, 26(2).







## 2/ THE CREATIVE INDUSTRIES

Before exploring the toolkit in detail, the creative industries/creative economy concept will be discussed, and the reasons why it has become increasingly prominent in economic debates examined.

### 2.1 The Creative Industries in Britain

The term 'creative industries' originated in the mid-to-late 1990s and was first taken up at a national level by the UK's government. The concept was an attempt to change the terms of the debate about the value of arts and culture. While the arts were supported to some degree or other by most governments, they tended to be seen as marginal to economic life and dependent on public subsidy. Advocates of the creative industries idea believed that this was too narrow a view – the totality of economic activity stemming from creativity and culture, including their commercial forms, needed to be considered to understand their true contribution. This activity included not just the traditional art forms, such as theatre, music and film, but service businesses such as advertising (which sell their creative skills mostly to other businesses), manufacturing processes that feed into cultural production, and the retail of creative goods. It was argued that the industries with their roots in culture and creativity were an important and growing source of jobs and wealth creation.

The adoption of the creative industries concept was very much associated with the election of the New Labour government in 1997 and the creation of the, then Department for Culture, Media and Sport (DCMS), now Department for Culture, Olympics, Media and Sport (DCOMS), which built upon the functions of the earlier Department of National Heritage. One of the new department's first acts was to set up the Creative Industries Task Force, which was responsible for the landmark Creative Industries Mapping Document in 1998 and a follow-up report in 2001.

The 1998 mapping document was the first systematic attempt to define and measure the creative industries. It was designed both to collect data on the industries and to promote a deeper understanding of the sector by telling its story in a way that politicians, journalists, investors, academics and government officials could immediately understand. It revealed, to the surprise of some, just how economically significant the creative industries were. It calculated that they accounted for almost a million jobs and 4 per cent of GDP in Britain, and earned £7.5bn from exports. It also showed, though, that the sector was polarised between a myriad of very small firms and sole traders and a handful of very large, often multinational companies.



The idea of the creative industries soon started to catch on as it was seen as encapsulating a truth about Britain's changing economic landscape. In particular, the definition adopted by the DCMS and the list of creative industries derived from it soon became influential.

The DCMS regards the creative industries as: 'those activities 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<sup>1</sup>.'

In its first mapping document in 1998, the DCMS went on to define the following industries as creative:

- **Advertising**

In Britain, employment in advertising, which includes marketing and some public relations activities, is dominated by multinational agencies, and is heavily centred on London: it and New York are widely regarded as the capitals of the advertising world. The London-based communications group, WPP, is the world's largest by revenue, employing almost 140,000 people in more than 100 countries.

- **Architecture**

Like many creative industries, the architecture sub-sector is made up of a handful of big firms and a very large number of small ones. The sub-sector's fortunes are closely linked to those of the construction industry. A number of British architects have achieved international reputations, including Norman Foster, Richard Rogers and David Chipperfield.

- **Art and antiques market**

This sub-sector includes dealers and auctioneers of antique jewellery,

paintings, sculpture, furniture, maps, drawings and prints. In Britain, most such businesses are small but some, notably Sotheby's and Christie's, are internationally important.

- **Crafts**

The DCMS includes textiles, ceramics, wood, metal, glass, graphic and leather crafts in this category. Businesses in this field are mostly tiny: 75 per cent are sole traders. The majority of craftworkers are women and, perhaps surprisingly, are mainly based in urban areas.

- **Design**

This sub-sector is hard to assess as much of it is hidden within other industries. The DCMS therefore looked at design consultancies and designers working in industry. It found that 70 per cent of British design companies were active abroad. London in particular has a strong reputation in this field, based on its excellent design schools.

- **Designer Fashion**

Fashion design is a relatively small sub-sector, but is highly integrated into the international market – even small fashion businesses look to export their products. Britain's fashion schools have helped train numerous internationally renowned designers, from John Galliano to Stella McCartney.

- **Film and video**

This sub-sector includes film production, distribution and exhibition. Although the UK has a number of successful home-grown producers, such as Working Title, the Hollywood studios dominate the British market. The number of films produced in Britain, and their box-office returns, fluctuates considerably from year to year.

- **Interactive leisure software**

This sub-sector principally consists of computer and video games, but also includes some educational and reference material. British gaming firms have a reputation for innovation, but many of the games they develop are sold by foreign-owned software publishers. DMA Design, a Scottish firm responsible for the initial development of the Grand Theft Auto series of games, is now ultimately owned by Take-Two, an American publisher.

- **Music**

This includes both live and recorded music, music publishing and the administration of music copyright. Britain excels in most forms of music, from rock and pop to classical, and its consumers spend more per head on music than almost any other country. EMI, one of the music industry's 'majors', is based in London.

- **Performing Arts**

Theatre, dance, ballet, musicals and opera performances all fall into this category. These art forms usually depend on a mix of public subsidy and private ticket sales and funding. Some parts of the sub-sector are nonetheless big revenue earners: London's West End theatre, with its wide variety of musicals and plays, is a major tourist attraction.

- **Publishing**

The publishing of books, newspapers, magazines and electronic information is one of the largest employers among the creative industries. The widespread use of English internationally means that book publishing in particular is a globally connected industry.

- **Software and Computer Services**

The biggest creative industry of all in the UK is software and computer

services. It covers the creation, production and supply of tools and applications and of software products, including web design. The large majority of employment in this sub-sector is based outside London. American multinationals tend to dominate in this field, but some British companies do well in niche markets, including Autonomy and Sage in business software.

- **Television and radio**

This sub-sector covers all public service, commercial, cable and satellite TV and radio, including the production and broadcasting of programmes. The BBC dominates the British market, but many independent companies have devised formats which have been successfully sold abroad. Who Wants to Be A Millionaire?, which has been shown in more than 100 countries, was developed by the independent company, Celador.

The DCMS's definition and list of the creative industries both provoked considerable debate. It has been argued, for example, that almost all new products have elements of creativity and intellectual property embedded within them. Separating off a handful of industries and labelling them as 'creative' is, according to this view, rather arbitrary.

More specific criticisms of the list have also been made. The inclusion of the computer software sub-sector has often been questioned. It is a large employer in many parts of Britain, yet much of it consists of conventional business software and consultancy rather than the more creative elements such as computer games development

or interactive media. The presence of the antiques trade on the DCMS list has also been challenged, on the grounds that there is no fresh act of creation involved, merely the retail of pre-existing ones.

Although some minor adjustments have been made to the list in response to these and other criticisms, the 1998 definition is still essentially the one used by the DCMS today. It is often used by other countries as the basis for developing their own definition.

The idea of the creative industries as set out in the DCMS mapping documents was quickly embraced not just by Britain's national government but also by its cities, regions and local government, partly encouraged by the work of the DCMS's Regional Issues Working Group<sup>3</sup>. A host of initiatives and programmes was launched by many public bodies, and 'creative' became a new economic development buzzword. At one time or other in the last decade, for instance, the creative industries have been a priority sector for all of England's regions. This enthusiasm coincided with sharp rises in employment in the creative industries in Britain in the late 1990s, which lent weight to the new model.

As time has gone on, however, it has increasingly been recognised that the creative industries cannot be seen in isolation. They have a number of important, wider dimensions, including:

- adding value to other industries, notably through design, advertising and branding
- being major employers of highly skilled people, thus being part of the

'knowledge economy' – that part of the economy which employs graduate talent

- contributing to the regeneration of towns and cities
- connecting and working with further and higher education
- bringing communities and people together through shared experiences.

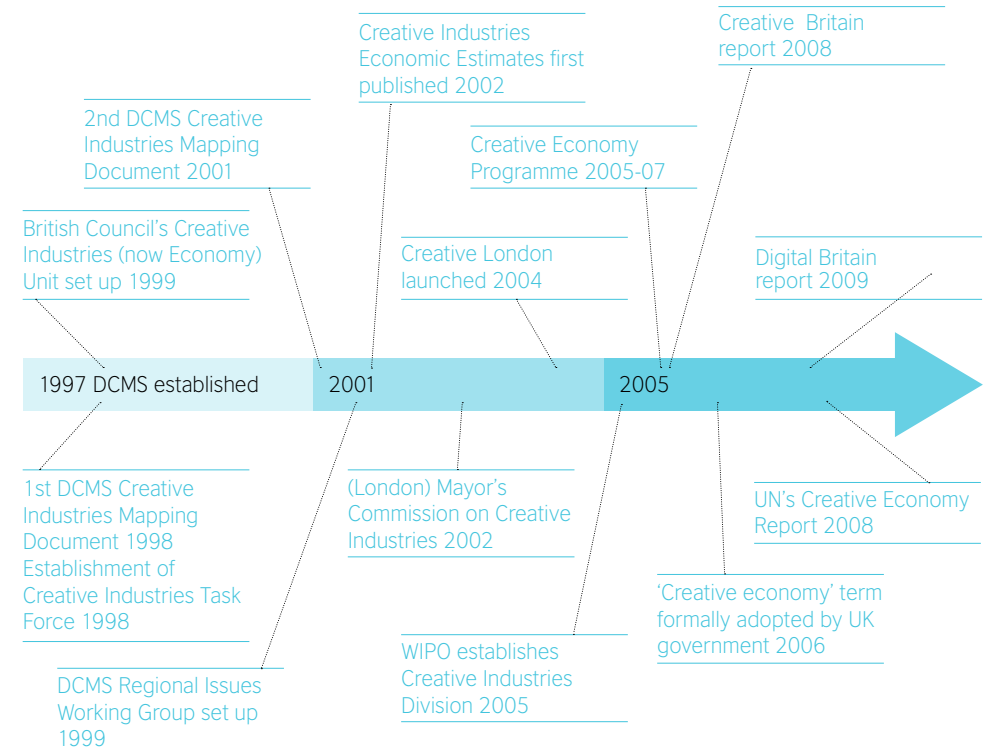
In 2006, the UK government formally adopted the term 'creative economy' to capture this sense of the wider contribution of the creative industries to economic and social life. This toolkit is concerned with mapping the creative industries themselves, so many of these broader connections and relationships fall outside its scope. Nevertheless, these connections are significant, and might well be the subject of further research once an initial mapping exercise is complete<sup>4</sup>.

The timeline on the right gives a sense of the way in which the creative industries concept has developed and been translated into evidence and policy in the UK since 1997.

The decision to produce the first Creative Industries Mapping Document in 1998 turned out to be a momentous one. It was the first systematic attempt anywhere to measure the creative industries on a national scale. It drew attention to a sector which, with its mix of technology and a long and complex cultural heritage, is unlike any other sector of the economy.

Although the mapping document focused just on the creative industries, it was the trigger for a series of developments which have rippled out across the British economy, leading to

## Key events in the evolution of the creative industries concept and policies



### Department for Culture, Olympics, Media and Sport (previously DCMS)

Since the publication of the mapping documents in 1998 and 2001, the Department for Culture has continued to carry out research into the creative industries. From 2002 onwards it has produced annual Creative Industries Economic Estimates bulletins, which provide a detailed analysis of the creative industries in Britain and are available online. The most recent figures show that the creative industries in Britain employed more than 1.1 million people (in 2008), and accounted for £16.6bn of exports and 6.2% of GVA (in 2007). The DCMS has built up considerable expertise in mapping, and is happy to share its knowledge with other countries. It is particularly interested in encouraging more accurate comparisons between countries. If you want to learn more about the DCMS's work, or wish to explore the idea of collaborating on developing comparative data, the British Council can help facilitate such discussions.



a greater recognition of the importance of creativity across the economy and society as a whole. It has led to a richer understanding of the creative sector and has helped to shape policy both in the UK and internationally.

The work of the Regional Issues Working Group helped encourage lower-level tiers of government in Britain to take up the idea early on. In 2002 London's then mayor, Ken Livingstone, established a Commission on the creative industries, to assess their value and potential contribution to the city's economy. As a world city, London's creative industries are unusually strong; in 2001 they were found to be second only to the financial sector in importance to London's economy. The Commission led to the establishment of Creative London, which aimed both to promote the city's creative industries and to use them to pursue the mayor's broader ambitions of regenerating some of the more run-down parts of the city and enhancing London's brand.

More recently, government strategies have increasingly been concerned with strengthening the

economic performance of the creative industries. Between 2005 and 2007 the DCMS launched a major research project, the Creative Economy Programme, which resulted in 2008 in *Creative Britain*<sup>5</sup>, a report which set out a support programme for the creative sector that touched on education, skills, innovation and intellectual property. A further landmark was the publication of *Digital Britain*<sup>6</sup> in 2009, which sets out the country's ambitions for the digital age. One striking aspect of the *Digital Britain* report is its focus on the creative industries: it is evidence of the extent to which the digital and creative sectors are merging due to technological change. Indeed, many public bodies in Britain now refer to these two as a single economic grouping.

Britain's example, then, as the first country to take up the idea of the creative industries, is a helpful one to explore. It has a wealth of experience on which to draw. However, it is by no means the only country to have adopted the concept. The following section discusses the creative industries in their international context.

## 2.2 The Creative Industries: International Context

The UK's decision to produce the first Creative Industry Mapping Document in 1998 turned out to be an important milestone internationally too. The definition and list of industries it contained were soon noticed and taken up, particularly in East Asia. Hong Kong, Singapore, Taiwan, Korea and China all developed analyses of their creative industries, based to a greater or lesser extent on the UK model. In most cases, the model has been adapted to fit local needs. Singapore, for instance, has produced a classification framework which groups the creative industries under three broad headings: arts and culture, design, and media.

Other parts of the world, notably Australia, New Zealand and Scandinavia, took up the notion too, though sometimes with significant differences from the UK's approach. Sweden, for example, talks about the 'experience economy' which, while including the creative industries, also embraces the likes of the restaurant business. In India, the definition includes lifestyle products and services, like yoga and Ayurvedic medicine.

Creative industries mapping exercises have now been carried out in many parts of the world. The British Council has been involved in such work in Colombia, Estonia, Indonesia and South Africa, among others.

International agencies, too, have adopted the idea of the creative industries or the creative economy. UNCTAD (the UN's trade and development body) has led the way, being the lead agency responsible for the UN's *Creative Economy Report 2008*<sup>7</sup>.

UNCTAD notes in its report that 'the creative economy has become a topical issue of the international economic and development agenda, calling for informed policy responses in both developed and developing countries'<sup>8</sup>. UNCTAD statistics reveal it accounts for a significant and growing slice of the world's economy. The Creative Economy Report 2008 quotes some impressive figures for the size of the creative industries. It calculates they account for:

- 3.4 per cent of world trade (in 2005)
- \$424 billion of exports (in 2005), growing at an average annual rate of 8.7 per cent between 2000 and 2005.

Source: UN Creative Economy Report 2008, p5

### Singapore's classification framework for the creative industries

Arts and culture	Design	Media
<ul style="list-style-type: none"> <li>• Photography</li> <li>• Visual arts</li> <li>• Performing arts</li> <li>• Arts and antiques trade, Crafts</li> </ul>	<ul style="list-style-type: none"> <li>• Software</li> <li>• Advertising</li> <li>• Architecture</li> <li>• Interior design</li> <li>• Graphic design</li> <li>• Industrial design</li> <li>• Fashion</li> </ul>	<ul style="list-style-type: none"> <li>• Publishing</li> <li>• TV &amp; radio</li> <li>• Digital media</li> <li>• Film and video</li> </ul>



The creative industries are important both to developed nations and developing ones. They matter to richer countries because they depend for their success on the creativity of their workforces and, as such, their competitiveness relies less on price than on the quality and imagination of their work. In turn, this suggests that they are less likely to lose out to the price-led competition which has caused many manufacturing and service jobs to be outsourced to emerging economies.

However, the creative industries also offer potential benefits to emerging economies. These countries also often wish to move away from competing solely on price, and are looking to identify new sources of competitive advantage and cultural recognition. Creative businesses, driven as they are by ideas and creativity, do not necessarily need access to large sums of capital or natural resources. For countries with rich cultures and a pool of local creative talent, the creative economy offers a way to build economic value. The Commonwealth

Foundation argues that for many of its smaller members in particular, which lack the capacity to exploit economies of scale, the creative industries offer better prospects for growth than many other sectors<sup>9</sup>.



UNESCO, the UN's cultural arm, has taken a more cautious approach to the idea of the creative industries, but the most recent revision of its cultural statistics framework in 2009 has taken more account of them<sup>10</sup>.

Other organisations have put forward alternative models of the creative industries. Perhaps the most interesting of these is one produced by the World Intellectual Property

Organisation (WIPO), which has devised a 'copyright' model that divides the creative industries up into three categories: core, interdependent and partial copyright industries. This model seeks to include all the industries involved in the creation, manufacture, production, broadcast and distribution and consumption of copyrighted works, and thus results in a rather different list from the DCMS's.

Initiatives like these have helped make governments more aware of the value of the creative industries and intellectual property to the global economy.

*For more general information on the creative industries and creative economy, please refer to the British Council's Creative and Cultural Economy series/1 publication.*

## WIPO's copyright model of the creative industries

Core copyright industries	Interdependent copyright industries	Partial copyright industries
<ul style="list-style-type: none"> <li>Advertising</li> <li>Collecting societies</li> <li>Film and video</li> <li>Music</li> <li>Performing arts</li> <li>Publishing</li> <li>Software</li> <li>TV and radio</li> <li>Visual and graphic art</li> </ul>	<ul style="list-style-type: none"> <li>Blank recording material</li> <li>Consumer electronics</li> <li>Musical instruments</li> <li>Paper</li> <li>Photocopiers, photographic, equipment</li> </ul>	<ul style="list-style-type: none"> <li>Architecture</li> <li>Clothing, footwear</li> <li>Design</li> <li>Fashion</li> <li>Household goods</li> <li>Toys</li> </ul>

Source: UN Creative Economy Report 2008, p5

### Notes/

- DCMS (1998) Creative Industries Mapping Document 1998, Department for Culture, Media and Sport, p3.
- DCMS (2000) Creative Industries: The Regional Dimension, The Report of the Regional Issues Working Group, DCMS, London
- For an interesting attempt at measuring the creative economy in Britain, see Higgs, P., Cunningham, S., and Bakhshi, H. (2009) Beyond the creative industries: mapping the creative economy in the United Kingdom, NESTA, London.
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- United Nations (2008) Creative Economy Report 2008: The Challenge of Assessing the Creative Economy: towards Informed Policy-making, United Nations, Geneva.
- Ibid., p4.
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- UNESCO Institute of Statistics (2009), 2009 UNESCO Framework for Cultural Statistics, UNESCO Institute of Statistics, Montreal.



## 3/ THE MAPPING TOOLKIT

The creative industries, then, is a concept which is rising in prominence. However, the fast-changing and cross-cutting nature of the industries poses challenges both for private investors, who may not fully grasp the ways in which the industries are evolving, and governments, which need to better understand the sector if they are to release the full potential of their creative economies and develop appropriate policies. In many places, very little is known about the creative industries' location and size, or what their needs might be. Mapping is designed to be a first step in addressing this.

It should be made clear that 'mapping' extends well beyond the production of actual maps. It is shorthand for a whole series of analytic methods for collecting and presenting information on the range and scope of the creative industries (or a particular part of them). This toolkit describes these techniques and assesses their strengths and limitations.

However, the mapping research itself cannot be considered in isolation. It lies at the centre of a series of other issues – political, managerial, practical – which shape the success or failure of a project. We have identified seven steps which have to be addressed if the mapping is to achieve its desired results.

## STEP 1 / WHY DO MAPPING?

To begin at the beginning: why do a mapping exercise at all?

A mapping exercise seeks to assess the value of the creative industries to the wider economy. This might be demonstrated through measures such as employment, the number and size of creative businesses, exports, gross value added, or the composition of the workforce (by gender or ethnicity, for instance).

There are five main reasons why someone might want to carry out such an exercise.

1/ To raise the profile of the creative industries.

A mapping project is first and foremost an exercise in getting the creative industries noticed and recognised. The sector is an unusual one, cutting across traditional industrial classifications and changing rapidly as technology evolves. As such, it often has a comparatively low profile compared with, say, financial services, manufacturing, or industries based around the exploitation of natural resources. A mapping project can raise awareness of the economic value of the industries, which is often substantial. It can also help create common frames of reference for talking about the creative industries. This in turn can be useful in increasing their political clout, so allowing them to get their needs taken more seriously. It can also help creative businesspeople in the different industries to see what they have in common.

2/ To learn more about the sector – what is happening and where is it taking place?

Beyond simply raising their profile, mapping can give insights into the structure of the creative industries. They are a varied and fast-changing group. Evidence from Britain and other countries suggests that they sometimes cluster together in certain places, and each industry faces its own set of issues. Mapping projects can reveal some of these patterns and how they are changing. This in turn is important for the third consideration – planning for future growth.

3/ To plan for future growth.

Understanding where you are now is essential to being able to plan sensibly. The creative industries often face particular challenges, such as finding affordable workspace, getting access to high-speed broadband services, and access to skilled labour. Mapping can help identify the needs of the creative industries and suggest ways in which they might be addressed.

4/ To engage leaders in the policy issues affecting creative industries.

By raising the profile of the creative industries and providing an evidence base on their size and location, mapping provides a platform on which to build policy arguments. It encourages politicians to take the sector seriously and to develop policies to push the creative industries agenda forward. Mapping can also help persuade other potentially influential groups, such as journalists or civil servants, of the need to support the creative sector.

5/ To support wider political or economic objectives.

Sometimes the interest in the creative industries lies not so much in the industries themselves but in their potential contribution to other pressing

agendas, such as urban regeneration, rural development or social cohesion. Making the creative industries' contribution more visible through mapping can help policymakers see how the industries could play a role in these other areas. In turn, this may allow some of the creative industries' needs to be addressed as part of wider initiatives.

### Who is it for?

The idea for a mapping project may arise from any of a number of sources: a senior civil servant or a creative entrepreneur, for instance. However, if a project proposal is to be taken forward, a sponsor has to be found – someone who can secure financial and political backing for the project. British (and international) experience suggests this person is likely to be a politician. He or she will have become interested in the creative industries and wants to raise the industries' profile by getting their economic value recognised and understood.

The sponsor needs to start thinking early on about who the project is ultimately for – who is he or she hoping to influence? Is the ambition to get officials in government or national statistics agencies to pay more attention to the quality of data on the creative industries? Is it to persuade politicians to make policy changes? Or is it to get the creative sector itself to think more deeply about its strengths and weaknesses? This decision has implications for the conduct of the mapping exercise, as the later steps in the process will show.

If such people are to be persuaded, though, the project needs to be credible. The sponsor therefore needs to give some thought to the feasibility of the project, and in particular the availability of information. All countries have national statistics agencies, either as part of their governmental structures or sometimes as semi-independent bodies. In some places, there are also regional or city-based 'observatories' that collect information on labour markets, businesses and employment. If a mapping exercise can adapt such statistics to reflect the circumstances and character of the creative industries, it is likely to help the credibility of the mapping project considerably. It is therefore important to check if these agencies have reasonably reliable figures, and effective methods for collecting and analysing the data.

It is worth noting that, even in countries which have generally good statistical services, certain individual surveys may be less reliable than others. Factors that have to be considered are the size of the sample, the geography at which the data was collected, and the availability of comparator years. There is inevitably also a time lag in compiling statistics, which can be a problem in the fast-changing environment of the creative sector.

If reliable data is not available, as is the case in some emerging (and even developed) economies, the suitability of non-governmental statistics needs to be explored. This might be data collected by trade associations or industry bodies, by trade publications or online networks, or by NGOs, private



businesses or universities. By patching such data together it may be possible to create workable datasets for a mapping exercise.

If even these are not available, the project researchers are going to have to compile their own data. The project sponsor needs to think through the feasibility of this – how much might it cost, and what level of coverage might be achieved.

It may be that there is too little data from any source to run a mapping project. If the sponsor still wants to raise the profile of the creative industries, there are other strategies that can be adopted. One alternative is to hold a series of events or seminars designed to encourage understanding and debate. These might involve the creative sector itself, wider interests in the business world, and government officials in departments such as trade and investment, culture, education, exports and economics. The British Council supports a number of such programmes (see appendix 1).



## Case study: Vietnam – Binh Duong Province

Vietnam's economy has grown very quickly in recent years, and creative businesses are being established, especially in the largest city, Ho Chi Minh City (HCMC). National networks are beginning to develop, too, notably Viet Craft, which has 450 members. As wage costs rise in the wake of economic growth, Vietnam is starting to think about ways of encouraging businesses to move up the value chain.

Vietnam has just begun to explore the concept of the creative industries. The British Council recently undertook an exploratory visit to Binh Duong Province, a district just to the north of HCMC. The provincial government sees the creative industries as a potential source of growth. Binh Duong Province already has a number of firms making good-quality 'creative' goods – principally crafts – for export, but these tend to use imported designs. It also has several media companies.

The consultant representing the British Council sought to assess the strengths and weaknesses of the province's creative industries, especially in the design and crafts sub-sectors, and to examine the possibilities of a mapping project. She spoke to businesspeople, creative entrepreneurs, higher education institutions and government officials. A seminar was also held in Ho Chi Minh City, to encourage debate about the creative industries.

The conclusions stemming from the visit were mixed. There is some local enthusiasm for the creative industries on which to build, but doubts were expressed by officials about the quality of available statistics and there was little evidence of relevant expertise in the local universities.

In a case like this, therefore, a full-scale mapping project at this stage would be premature. Instead, the reliability of local and national statistics needs to be further investigated, sources of creative industry expertise have to be identified, and an assessment has to be made of which industries it would be useful to map. It might make more sense in this case to provide a broad overview of the creative sector followed by detailed work on a handful of industries: design, crafts and media. In the meantime, awareness could be raised by holding seminars on topics of interest to local firms, such as branding and innovation, and strengthening creative networks.

## STEP 2/ WHICH POLICY QUESTIONS CAN MAPPING ADDRESS?

Mapping projects are rarely undertaken simply out of intellectual curiosity. Most project organisers have ambitions to influence the future development of the creative industries. To do this, though, they need to understand which policy areas mapping projects can realistically hope to influence. A research report commissioned as part of the DCMS's Creative Economy Programme<sup>11</sup> suggested there were three that are particularly important (see table below).

### Areas of policy interest

Creative industries mapping or evidence-gathering exercises have shaped the UK's policy approach in all three of these policy areas. The following case studies look at examples from across the country

#### Local (place-based) economic development

Regions and cities are often most interested in the contribution of the creative industries to local economic development. The creative industries have a tendency to cluster together, often in city districts that have been abandoned by traditional manufacturing industries. Creative businesses are also often very small in size, strongly rooted in their local communities, and employers of highly skilled people. As such, they can help to regenerate run-down areas, help a place to diversify its local economy and allow an area to 'rebrand' itself.

### Areas of policy interest

Local (place-based) economic development	National industrial policy	Cultural policy
<ul style="list-style-type: none"> <li>• City or regional growth</li> <li>• Regeneration</li> <li>• Local and regional cluster development</li> <li>• Regional economic diversification</li> <li>• Place-making/ city and regional branding</li> </ul>	<ul style="list-style-type: none"> <li>• Innovation</li> <li>• International competitiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Architecture</li> <li>• Cultural co-operation</li> <li>• Cultural diversity</li> <li>• Cultural exchange</li> <li>• Cultural identity</li> <li>• New cultural forms</li> </ul>

Source: BOP Consulting, 2006

## Urban regeneration in the UK

In a number of British cities clusters of creative industries have contributed to urban economic revival. Sometimes this has been unplanned: artists and creative people have moved to certain city neighbourhoods and have built a new economy there. In other cases, local government has made a conscious effort to strengthen the creative industries in a locality by providing assistance, sometimes by designating the district a creative or cultural 'quarter'.

An example of the first is Shoreditch, a neighbourhood in east-central London, which has been transformed by the creative industries over the last 15 years. The decline in manufacturing in London throughout the twentieth century saw Shoreditch's traditional industries, notably furniture and textiles, virtually disappear, leaving the area poor and economically depressed. However, it also left warehouse space behind. London as a whole has a large population of art and design students and working artists, who are always looking for cheap, flexible workspace in the inner city. In the 1990s Shoreditch thus began to be colonised by artists, a trend which was symbolised by the establishment of the White Cube gallery in Hoxton Square, the spiritual home of the Young British Artists (YBAs), such as Damien Hirst.

As more and more artists moved to the area Shoreditch acquired a more fashionable image. This attracted more mainstream creative businesses, in fields such as advertising, architecture, photography and, especially, design. This wave of affluent professionals in turn attracted bars, restaurants and clubs to the area, leading to it becoming one of the centres of London nightlife with a reputation for being on the cutting edge of London style. Shoreditch has become a classic example of inner-city gentrification. More recent developments have included an upmarket hotel and a major new gallery for multicultural art, Rivington Place. The rising rents and a tendency for warehouses to be converted into residential space have started to push out the artists responsible for the area's revival; they have begun to move further east.

The Shoreditch cluster was largely unplanned, but it was soon noticed by local and city-wide government bodies. A number of mapping exercises were undertaken, and policies devised to support the growth of creative industries in the area. There were also some unexpected knock-on effects: Westminster, the traditional centre of creative industries in London, commissioned a mapping study to help it understand why some of its businesses were moving to Shoreditch.

The creative industries are a large and dynamic sector in London. In other places in Britain the creative industries make up a relatively smaller share of the economy. Local government in such areas have often made more systematic attempts to encourage Shoreditch-style creative clusters.

In Manchester, for instance, the city has built on the growth of the creative industries in the Northern Quarter district of the city centre. As in Shoreditch, its traditional industries had declined, leaving cheap space behind that proved attractive to creative industries, especially in fashion, galleries, and music. Affleck's Palace, an indoor market that is something of a Manchester institution, embodies the bohemian culture which has taken root in the area with its many small creative retailers. When it became clear that the city centre was attracting creative industries the city council took an active role in supporting and promoting them. As a result of a mapping and research study, it set up CIDS (the Creative Industries Development Service), an organisation based in the Northern Quarter that provided support and information to creative businesses across the city. The growth of the creative industries has been credited in part with reversing the longstanding decline in the residential population of the city centre.

Birmingham is attempting to do something similar in Digbeth, which lies just south of its city centre. The district has been identified by the city council as a potential hub for the creative industries in that city. Like Shoreditch and the Northern Quarter, Digbeth has largely been abandoned by manufacturing and wholesaling businesses, leaving potentially usable space behind. Private developers have taken note and have converted a number of buildings in the area for use by creative industries. The first of these was the Custard Factory, a former food-processing facility, which is now home to 250 small creative businesses. Its success has been repeated nearby at Fazeley Studios, a former chapel, and at The Bond, a converted Victorian warehouse.

Birmingham City Council is looking to build on these successes to establish a creative cluster. It has plans to upgrade broadband connections in the area to create a digital hub and has supported a new campus of the South Birmingham College in the area, which offers a number of courses related to the creative industries. Together with public realm improvements, and the area's strong reputation for live music, it is hoped that a 'buzz' can be created in Digbeth to attract new businesses and residents.





## National industrial policy

At a national level, policymakers are often more interested in the creative industries as a source of international competitiveness and as a key part of the debate on national industrial policy in the fields of innovation, technology and intellectual property. The digital revolution (or 'digital shift' as it is sometimes known) has put creative businesses, especially in media, on the front line of these issues. Their experience has lessons for other parts of the economy which are facing similar challenges.



## Digital Britain

British government ministers have for some years now identified the creative industries as a particular strength of Britain's economy, and have declared an ambition to see the UK become the world's creative hub. This is reflected in the focus of government bodies; both the Technology Strategy Board and UK Trade and Investment (UKTI) have identified the creative industries as a priority area for their activities. This thinking has also helped shape recent policy and legislation.

The *Digital Britain* report, published by the government in 2009, was Britain's most serious attempt to date to come to grips with the new digital age<sup>12</sup>. Stephen Carter, the Minister for Communications, Technology and Broadcasting at the time (the report's author), described it as 'an overdue recognition of the industrial importance of the creative industries'. The report frequently mentions the challenge posed by other nations' plans for digital technology and infrastructure, in particular the high levels of public and private investment in broadband infrastructure in countries such as the United States, Japan and Australia.

The report had three broad themes: increasing digital participation; building a new communications infrastructure; and modernising the relevant legal and regulatory frameworks. Many of the proposals in it deal with the production and trade of creative goods and services, the role of intellectual property, and the relationship between the public and private sectors. In particular, the report saw piracy as a major threat to the future health of the creative industries and put forward proposals for dealing with it. A number of these policy proposals became law with the passing of the Digital Economy Bill in April 2010.

## Cultural policy

The third area of interest is cultural policy. The creative industries have their roots in longstanding cultural traditions. Indeed, for many creative businesspeople the cultural value of their work is at least as important as its economic value. In a globalised, connected world many places are wrestling with the question of how to maintain their cultural identity without becoming 'living museums'. Commercial culture can be a way of ensuring the survival of cultural traditions by giving them a new value and importance or by

allowing them to re-invent themselves in new forms.



## The European Capital of Culture programme

The European Capital (or City) of Culture programme (ECoC) is an example of the way in which culture can be used to change the image of a place and spur the development of the creative sector. ECoC was the brainchild of the Greek actress turned politician, Melina Mercouri, who wanted to raise culture's profile in the European Union. Although it was launched in 1986, it wasn't until 1990, when Glasgow was the host city, that the idea really began to have an impact. As a study of the ECoC hosts observed, 'Glasgow was a turning point ... in that the city set multiple aims with specific reference to cultural, economic and social goals. Almost all cities that followed have taken a similar approach'<sup>13</sup>. These goals included boosting tourism, improving the city's image, revitalising the city and increasing the number of creative industries and jobs.

Glasgow's year as ECoC was part of a 25 year-long effort to use culture to build up its identity. Although Glasgow had been one of the great trading centres of the Victorian era – it was known as the second city of the British Empire – by the 1970s and '80s it had lost much of its manufacturing base and had acquired a reputation for poverty and violence. In the words of a city official, it was perceived as 'the worst corner of Britain'<sup>14</sup>. In the '80s, the city council decided to give culture and creativity a prominent role in its regeneration efforts.

These began with the *Glasgow's Miles Better* publicity campaign, which stressed the city's cultural assets, including the then recently opened Burrell Collection, and the city's hosting of a Garden Festival in 1988. Things took a big step forward in 1990, when the city's year as European Capital of Culture helped it become a presence on the international stage. It improved the image of the city

and its attractiveness to businesses of all kinds, and also helped raise the profile of cultural activity. As the report observes 'over the 1990s, there was a very significant increase in jobs within the cultural and creative industries including music production, film production, book publishing and design trades'<sup>15</sup>. The creative industries have thus become part of a new cultural identity for the city, which has helped displace the older images. Glasgow was UK City of Architecture and Design in 1999, and has recently been declared a City of Music by UNESCO. In 2014, it will host the Commonwealth Games.

Glasgow has maintained this momentum with a programme of its own festivals and events and new and redeveloped cultural facilities. It now has the highest per capita spend on culture and sport of any British city. Projects over the last 25 years have ranged from the St Mungo Museum of Religious Life and Art to the revitalisation of the Merchant City district. The city's Head of Arts and Museums has noted that the city's economic development department doesn't always look for direct economic benefits – it sees 'quality of life' projects as providing important indirect benefits to the city<sup>16</sup>.

In 2008 the European Capital of Culture honour, which rotates around Europe, returned to the UK, to Liverpool. The city has long had a strong and diverse culture, stemming partly from its position as an Atlantic port. Its contributions to British (and international) cultural life range from the Beatles and the Mersey poets to playwrights like Alan Bleasdale and Willy Russell. Despite this, though, the city is also one of the poorest in Britain, with a range of social problems and a troubled political history. In the last decade, Liverpool's economy has staged a partial recovery, and there has been an effort to move away from the political controversies of the 1980s and 1990s. Liverpool's year as ECoC was (at least in part) an attempt to use its cultural strengths to make outsiders more aware of these changes and to achieve wider benefits, such as increasing cultural participation and tourism.

Liverpool has commissioned a research team to measure and map the impacts of the programme over a five-year time period. While it is too early to measure the longer term effects, the short-term results are promising. Liverpool received ten million additional visits in 2008 thanks to ECoC, with an estimated economic impact of more than £750m<sup>17</sup>. Businesses in the tourism sector were extremely positive about the year, while by early 2009, just over half of the arts representatives spoken to thought that the city had achieved its aspiration to become a world-class city. Nearly three-quarters of creative industries businesses surveyed also felt that the longer-term impacts of ECoC on their businesses would be beneficial, while media coverage presented a much more positive image of the city than usual.

For both Glasgow and Liverpool, then, the creative industries are not simply economically beneficial; their cultural and reputational impact is at least as important. The industries are helping to re-shape the way that the rest of Britain and the wider world see the two places.



### STEP 3/ HOW ARE THE CREATIVE INDUSTRIES DEFINED?

Having decided that a mapping exercise would help with achieving certain economic or political goals, the next step is to focus on the practicalities of the process. The following sections of the toolkit (steps 3 to 5) deal with this, but in reality there is some overlap between them: decisions in one area have implications for the others. The first of these practical steps is to agree a definition of the creative industries. Deciding what is in and what is out will help clarify the scope of the work.

As has been seen already, there is no standard definition of the creative industries in use – most countries adapt the concept to meet their own needs. In most mapping exercises a definition is chosen that reflects the particular characteristics of each country’s industrial, cultural and social development. This can be drawn up in consultation with experts either in the country or abroad. Issues that may have to be taken into account include the size of the informal sector, and the rural-urban split within a country – the more commercial creative industries tend to be based in the larger cities.

It should be noted, though, that as time has gone on a consensus has started to develop over what should typically be included. There is now considerable common ground between many of these frameworks.

The figure to the right, for instance, shows the definitions adopted for the creative industries in Britain, Germany, Spain and France. As the table shows, many of the industries

appear on all four lists.

Drawing up a list of industries is only the start of the process, however. The list has to be ‘translated’ into a form that is compatible with the data sources that the mapping exercise will use.

In Britain, for example, an analysis of Standard Industrial Classification (SIC) code data (the British equivalent of ISIC data, the International Standard Industrial Classification) underpins any serious creative industries strategy. The list of creative industries is converted into a detailed group of SIC codes, which are used to analyse data from official government surveys such as the Annual Business Inquiry or the Labour Force Survey.

However, for historical reasons – SIC codes were established long before some of the creative industries had evolved into their current form, and are updated infrequently – the codes often don’t reflect the creative industries very well. As a result, any British researcher has to think about weighting certain codes to allow for the fact that they combine a mix of creative and ‘non-creative’ activities.

To give just one example, the 1992 and 2003 SIC codes include a class called ‘74.20: Architecture and engineering activities and related technical consultancy’. This covers a wide range of activities including the likes of mechanical, mining and nuclear engineering, building and quantity surveying, and technical writing and illustration, as well as architecture and its related professions. Some way needs to be found to separate out the creative industries from the ‘non-creative’ ones.

The DCMS’s approach is to apply standard weightings (developed from

### Comparison of four countries; definitions of the creative/cultural industries

	UK	GERMANY	SPAIN	FRANCE
Term used	Creative industries	Culture and creative industries	Culture industries	Cultural sector
Architecture	×	×		×
Audio-visual (film, TV, radio)	×	×	×	×
Performing arts	×	×	×	×
Libraries			×	×
Design	×	×		
Art market/ Visual arts	×	×	×	×
Publishing	×	×	×	×
Fashion	×			
Software/ multimedia	×	×		
Museums/ cultural heritage			×	×
Music	×	×	×	×
Crafts	×			
Advertising	×	×		

Source: Adapted from Hölzl, K. (2006) *Creative Industries in Europe and Austria: Definition and Potential*, and Söndermann, M. et al (2009) *Culture and Creative Industries in Germany*.

its research) to the SIC codes it uses to prepare its annual Creative Industries Economic Estimates. The industries, the SIC codes and the weightings used by the DCMS are shown in Appendix 2.

If the geographical unit is small, the robustness of the data will present further challenges. The creative industries typically account for around 3-4 per cent of employment in Britain on measures derived from the DCMS list. At the level of the city or the region this can translate into relatively small absolute numbers of creative businesses. One way to ensure that you still have reliable results is to group the creative industries together in broader categories according to some underlying principle.

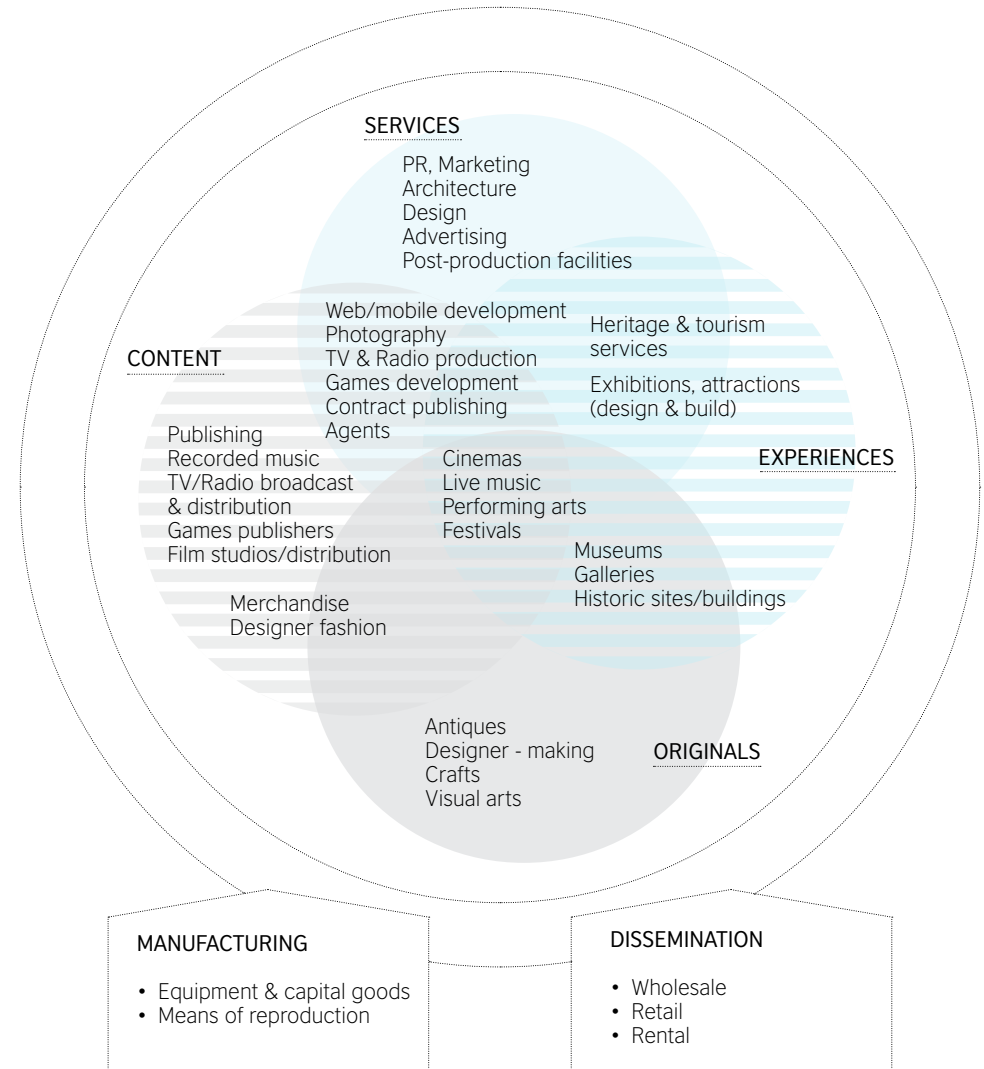
In 2004, for example, the DCMS proposed the DCMS Evidence Toolkit (DET) for use at regional level. It groups creative industries together into four 'domains', based on their nature of their final outputs: Books & Press, Audio-Visual, Performance and Visual Arts & Design.

### DCMS Evidence Toolkit (DET) creative industries domains

AUDIO-VISUAL (AV)	AUDIO-VISUAL (AV)
<ul style="list-style-type: none"> <li>• TV &amp; radio</li> <li>• Film &amp; video</li> <li>• Photography</li> <li>• Advertising</li> <li>• Music</li> <li>• Interactive digital media (games,web, mobile etc)</li> <li>• Computer software</li> </ul>	<ul style="list-style-type: none"> <li>• Publishing (books, magazines, newspapers)</li> <li>• Literature</li> <li>• Printing</li> </ul>
PERFORMANCE (P)	VISUAL ARTS & DESIGN (VA)
<ul style="list-style-type: none"> <li>• Theatre</li> <li>• Dance</li> <li>• Circus</li> <li>• Carnival</li> <li>• Puppetry</li> </ul>	<ul style="list-style-type: none"> <li>• Design (inc. fashion design)</li> <li>• Architecture</li> <li>• Fine arts</li> <li>• Crafts</li> <li>• Art &amp; Antiques</li> </ul>

While this classification is simple to understand, and has often been used at sub-national level in Britain, it is not the only way to interpret the creative sector. A number of alternative approaches have been put forward. One such is the Creative Business Models approach (NESTA, 2006)<sup>18</sup>. This gathers creative industries into four circles, according to the business models and supply chains they have in common. These circles – Creative Content, Creative Services, Creative Originals and Creative Experiences – seek to draw attention to the similarities between the practices of, say, an architect and an advertising agency: both are essentially selling their skills and time (rather than an end product) to other businesses, not to consumers.

### Creative Business Models Framework





## STEP 4/ WHO IS IN CHARGE? WHO DOES THE WORK?

The idea for a mapping project may arise from any of a number of sources: a senior civil servant or a creative entrepreneur, for instance. However, if a project proposal is to be taken forward, a sponsor has to be found – someone who can secure financial and political backing for the project. British (and international) experience suggests this person is likely to be a politician. He or she will have become interested in the creative industries and wants to raise the industries' profile by getting their economic value recognised and understood.

However, to take the idea further some more concrete action is needed. It has to be decided who will run the project, and who will do the work. Careful thought needs to be given to this. The project sponsor is not necessarily the one who should lead on the actual research work.

There are in essence three distinct roles in a mapping project. Sometimes these will be filled by three people or organisations, sometimes one person may combine two (or more) of the roles:

- The **project sponsor** will bring high-level power and influence and will champion the project, securing financial and political backing to enable the mapping to go ahead. He or she may well use the mapping to develop policies and activities, often at government level. The sponsor is likely to be a politician or someone with good political connections.
- The sponsor in turn will identify a **project leader** to administer the

project. The leader will be in overall charge of recruiting and management of the project team, drawing up a detailed budget, and supervising the research and the production of the final document. The leader has to understand the wider political, cultural and economic landscape in which the project is being conducted and make sure what is being produced meets the sponsor and the sector's needs. This person might typically be a government official or civil servant.

- The project leader has to find a **chief researcher** will lead the team responsible for the quantitative and qualitative research work. Mapping the creative industries is ultimately an exercise in economic analysis. It is probably desirable therefore to have an economist or an economic geographer in the team. Such people will typically be drawn from academia, although private-sector researchers or consultants may also have the skills required. In practice, a project leader might look to identify the economics or cultural department of a local university as a research partner in the project.

It is useful for these three to meet regularly throughout the mapping process to review progress.

## STEP 5/ WHICH RESEARCH APPROACH SHOULD BE ADOPTED?

The research approach chosen will vary according to the particular circumstances of a project, especially the reliability of available data. There are six basic building blocks from which a mapping exercise can be constructed. They are not mutually exclusive, and an exercise may well combine a number of them.

Researchers can use a range of quantitative and qualitative research tools across these blocks, including statistical analysis, surveys, interviews, focus groups and web-based research. While it is often assumed that quantitative methods are more robust – they can be used to establish trends over time, for instance, and to compare the creative sector to the rest of the economy – they cannot provide a comprehensive picture of the creative industries. Qualitative work can give further details and more nuance, which help to make sense of the statistical evidence. A mapping exercise is likely to mix the two sets of tools.

The six building blocks are:

- literature review
- analysis of official government data
- industry-specific studies
- analysis of non-governmental data
- directories of businesses
- case studies.

### Literature review

It is always helpful to review previous work before carrying out new research. Exploring work that was completed earlier or which was done for nearby areas can provide a useful context for the mapping project and

can give guidance drawn from the experiences of others. It can also help to avoid duplication and may identify gaps in knowledge about the creative industries which the current project could address. A literature review is almost always a precursor to the main part of the research.

### Statistical analysis of official government data

This approach offers the most comprehensive overview of a locality's creative industries and is the only option which allows for meaningful comparisons between countries. On cost grounds, it is also the only method which can be used to produce a nationwide assessment of the creative industries, unless the nation concerned is very small.

Official government statistics can be used to assess the creative industries' contribution to employment, business numbers, exports, or GVA among other measures. There is a range of international classification systems used in most countries from which creative industry data can be derived. These include the International Standard Industrial Classifications (ISIC), the Central Product Classifications (CPC) and the International Standard Classification of Occupations (ISCO). The UN's Creative Economy Report 2008 explores the uses of these statistics in more depth.

The data used may either be standard government data adapted to the circumstances of the creative sector, as is the case in the UK, or in some cases may be collected specifically for the creative or cultural sector, as happens in Canada.

## Industry-specific studies

Sometimes the project sponsor is particularly interested in specific sub-sectors of the economy, either because the local economy is strong in that area or because the industries are politically important: TV broadcasting often falls into this second category. In such cases it may be possible to carry out surveys of individual industries.



This option will probably have an element of statistical analysis of government or other data, as the project team attempts to assess the size of the sub-sector as a whole, but it is likely to be supplemented with a range of qualitative methods, such as interviews with businesses. These would allow the researchers to explore issues in the sub-sector in more depth. In Britain, for example, the digital media sub-sector has often been the subject of industry-specific mappings, as it is felt to be particularly important economically, but is also changing rapidly.

## The West Midlands

The West Midlands region of England has identified the Screen, Image and Sound industries (which include TV, film, video and computer games) as a priority sector. In 2007, a mapping study<sup>19</sup> found that it was a dynamic sector with strong growth in business formation and high levels of innovation. Computer games were found to be a particular strength of the region. In all, the cluster of industries employed at least 15,000 people across the West Midlands.

## Analysis of non-governmental data

In many countries, government statistics may not be detailed or reliable enough to be a sensible choice for a mapping exercise. If so, other approaches have to be considered. One possibility is to compile statistics from alternative sources. In many countries private sector businesses produce databases of firms for marketing or other purposes. Trade associations and industry bodies too may have registers of members which could be drawn upon. Trade newspapers and magazines can also be sources of information. Research may have been carried out by universities, trade unions or NGOs which could be drawn upon. The ever-widening spread of the internet means that online social and professional networks for creative workers and businesses may also be useful sources of information.



## Case study – Gauteng, South Africa

The British Council helped to sponsor a creative industries mapping project in South Africa in 2008, in Gauteng province. A team was brought together that included the Gauteng provincial government, a local consultancy with previous experience of creative industry research, and the University of the Witwatersrand.

Between them, the team came up with a working definition of the creative industries that reflected the circumstances of the province. It focused on ten industries: visual arts, performing arts, cultural tourism and heritage, multi-media, music, crafts, print media and publishing, audio-visual, design and fashion.

The process began with a two-day workshop to raise awareness of the issues a mapping project might encounter. The team concluded that official data in South Africa would not be sufficient to support a mapping exercise. They decided instead to create a bespoke dataset drawing on a range of non-governmental sources. While this approach was thought unlikely to pick up every creative business in the province, it was felt that it could be used to make estimates of the aggregate size of the business population. It also had the advantage of being able to reach into the province's sizeable informal sector.

To augment this work, the research team also carried out a large number of interviews with creative

practitioners. In all, 540 were spoken to by phone, with a further 190 interviewed face-to-face. The research found 11,320 creative firms in the province, employing 182,000 people. The cultural tourism and heritage and design sub-sectors were the two largest employers.

The data sources on which the mapping project in Gauteng province in South Africa drew were<sup>20</sup>:

**Across sub-sectors:** Funding database from National Department of Arts and Culture, Grants in Aid provided by Gauteng Arts and Culture Council

**Visual arts:** Visual Arts Network South Africa (VANSA) members list, the 2007 South African Art Information Directory

**Performing arts:** Performing Arts Network of South Africa (PANSA) members list, Theatre Management SA

**Cultural tourism and heritage:** Museums Online SA ([www.museums.org.za](http://www.museums.org.za)), Gauteng Tourism Authority ([www.gauteng.net](http://www.gauteng.net)), South African Heritage Resources Agency

**Multimedia:** Animation SA ([www.AnimationSA.org](http://www.AnimationSA.org))

**Music:** Midi Trust Book, The South African Roadies Association, Technical Production Services Association

**Craft:** Ceramics SA members list, Craftwise Magazine

**Audio-visual:** National Association of Broadcasters members list, National

Community Radio Forum ([www.ncrf.org.za](http://www.ncrf.org.za)), Gauteng Film Commission ([www.gautengfilmdirectory.org.za](http://www.gautengfilmdirectory.org.za))

**Print media and publishing:** Audit Bureau of Circulations members list, Publishers' Association of South Africa (PASA) members list

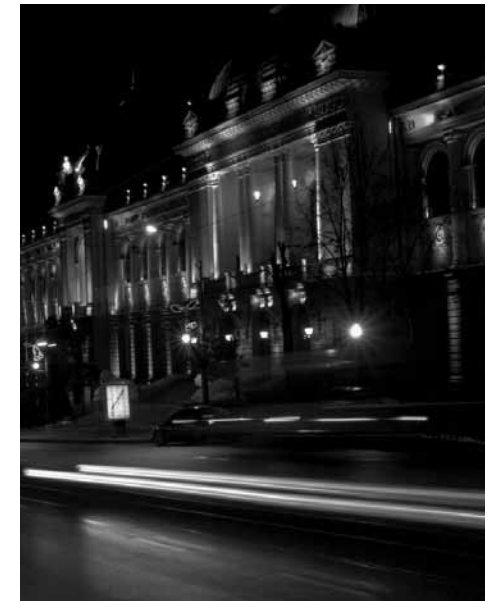
**Design:** Design Educators' Forum SA members list, [www.BizCommunity.co.za](http://www.BizCommunity.co.za)

**Fashion:** Sanlam SA Fashion Week database, [www.ifashion.co.za](http://www.ifashion.co.za)

## Directories

If there is no reliable non-governmental data to draw on, then the research team will have to carry out primary research. The best place to start mapping in such a case may be to attempt to create a directory of creative businesses in the locality. Researchers can draw on a number of sources, including their own knowledge and contacts within the sector, to help compile such a list. These can then be used in a 'snowball' survey, where the businesses known to the researchers are asked to name any other creative businesses they know, which in turn are asked for the names of other businesses, and so on. This can also be carried out online. This method may also be able to reach into the informal sector, which government statistics are unlikely to include.

One advantage of this approach is that it can be initiated by the creative sector itself.



## Case Study – Iași, Romania

Iași in Romania was identified in 2005 as a potential 'creative city' by a multinational project funded by the British Council in South-Eastern Europe. A conference and workshops were held in the region to agree plans of action to develop this idea further. It was decided that the most appropriate mapping exercise for Iași would be to create a single directory of creative businesses for the city. This project took several months to complete and involved local businesses, institutions and the city's British Council Centre.

The aim of the project was to demonstrate the economic value of the creative sector to potential partners and to lay the ground for future partnerships. Iași also hopes to be a trailblazer for other Romanian cities in understanding the role of the creative industries. The group which organised the directory has since been able to secure funding from an international investor to start setting up a development agency for the creative industries in the city.

## Case Studies

In some cases, budgetary constraints or a lack of political support can limit the scope of a project. One option in such a case is to supplement a broad overview of the creative industries with a series of case studies, selecting a handful of projects or organisations working in the creative sector and subjecting them to a detailed analysis of their economic and social impacts. This can provide useful information about the organisations concerned and help persuade policymakers to consider the economic value of culture.

## Case Study – São Paulo

Although São Paulo is the business capital of a large, fast-growing and sophisticated economy, its creative industries have not been recognised as a distinct entity until now. An ongoing project is aiming to remedy this. A small team, headed by an economist, made an initial research trip to London to discuss issues around mapping. They are now carrying out a statistical mapping based on the UK methodology. This is to be supplemented by assessments of the impacts of two creative industry activities in the city: São Paulo Fashion Week (which is actually the ‘front end’ of a much larger year-round project developing skills in the fashion and textile industries), and a music-based community centre, which is training local amateur musicians to become semi- or fully professional acts. The research team aims to produce detailed case studies of the impacts of these organisations.

The team hopes to build on this work in the future to encourage São Paulo’s politicians to see the value of the creative industries. There is a strong sense, therefore, that this mapping exercise is only the first step in raising the profile of the creative industries’ contribution to São Paulo’s life.

## STEP 6/ HOW CAN THE PROJECT’S FINDINGS CONNECT WITH KEY AUDIENCES AND POLICY AGENDAS?

Completing the research phase of the project is not the end of the story. Consideration needs to be given to how best to raise awareness of, and debate about, the project, and how its findings might be communicated. It is important to think about the message that is conveyed – how can the report tell the story of the creative industries locally?

There are ways of presenting findings which make them more likely to be understood and acted upon. Part of this is simply a matter of the presentation of the report (if that is the actual output of the mapping process). A well-written, attractively-designed report which presents data in arresting ways may well receive more attention than one which does not have these qualities. Opportunities to disseminate findings more widely, such as posting them on the web, issuing press releases or holding seminars and events, should also be explored fully.

Beyond this, though, the researchers need to think about connecting their findings to the wider policy agenda they wish to influence (see step 2). There are four main areas to which attention should be given.

### Telling the story

The mapping needs to draw out a clear story about the creative industries from the evidence that has been collected. This can then be tailored towards the audience at which the project is aimed. A report which is intended to influence civil servants in a national statistics agency or a country’s finance ministry,

for example, may have to adopt a more restrained, technical style than a piece of work aimed at persuading a city’s mayor. The project leader therefore needs to think carefully about the style and message of the reporting of the project, and the style of writing and presentational skills available within the team. The research also needs to look ahead, perhaps by putting forward a plan for future action and by making links to policy.

### Engaging with the creative industries themselves

In many places the creative industries do not yet see themselves as a coherent group. Even if the mapping exercise is aimed primarily at influencing government officials, it therefore represents a great opportunity to engage the creative industries in a debate about the sector’s prospects. This can be done through promotional events around the report’s launch, seminars or workshops to explore issues raised in the report or online forums to open up the discussion.

### Making links to policy

The mapping research is an evidence base on which sound policy for the creative industries can be built. The research team may therefore want to make suggestions or recommendations for courses of action in these areas, based on the findings of the research. Step 2 identified three broad policy agendas to which the creative industries can contribute. International evidence suggests that there are a number of specific policy recommendations that are often seen



under these agendas<sup>21</sup>. These can give a sense of the type of intervention that the mapping project might recommend.

### Local economic development

Possible policy recommendations include:

Workspace: Creative entrepreneurs benefit greatly from the chance to network to develop their ideas and find buyers for their products. This can be encouraged by allowing small creative firms to share space with other such businesses. Older industrial buildings often provide suitable premises for conversion into such facilities. 401 Richmond in Toronto is a historic printing factory (built in 1899) which has been converted into workspace for more than 150 artists and small creative businesses. It combines public spaces (including a roof garden) with education facilities and offices.

Education and skills initiatives:

The creative industries often employ highly skilled people, but the small size of many creative firms limits the amount of time and money they can spend developing such skills. The fast-changing nature of the industries creates further challenges in keeping up with the latest technologies. In such situations, the role of higher education institutions becomes particularly important. In 2000, the Korean Ministry of Culture and Tourism opened the Game Institute in Seoul to train professionals for its domestic video games industry, as part of its aim of transforming the industry into one of the world's top three by 2007.

### National industrial policy

Possible policy recommendations include:

Intellectual property protection: Rapid changes in technology and the

relentless growth of the internet have brought the question of intellectual property law to the fore. How best to protect the rights of creators, without stamping down on new forms of collaboration?

Production quotas: These aim to support the domestic industry by limiting imports, thus giving local producers a protected share of the domestic market (though international trade rules can affect such restrictions). As such, they potentially allow firms to develop the critical mass necessary to develop competitive products. China is developing its own animation films for broadcast by setting a quota for the import of non-Chinese productions.

### Cultural policy

Possible policy recommendations include:

Export promotion: The small size of many creative firms limits their ability to reach international markets, yet creative and cultural products are often among the most distinctive parts of a country's image, as the example of Jamaican music shows. Many countries address this by promoting their creative products and culture on an international stage through branding and showcasing. Scotland promotes a very successful annual 'Tartan Week' in New York, featuring Scottish-made products ranging from new fashion designs and performing arts to whisky.

Targeted investment: Some countries offer loans or assistance to specific industries and in a few cases to the creative industries as a whole, often with the aim of protecting culturally sensitive industries. Such an approach aims to ensure that the diversity of a

nation's culture is protected. France's Centre National de la Cinematographie (CNC) charges a levy of around 50 pence per ticket on cinema box-office sales, which is held in a fund for the individual producer for use on subsequent films. It thus aims to give filmmakers a financial platform on which to secure further funding.

### Designing and evaluating policy recommendations

Recommendations such as those described above need to be carefully planned and based on sound evidence. It is therefore important that options are considered by the researchers during the mapping research and incorporated into the work – for instance, by discussing the possible need for them with businesspeople in interviews. If this is done, the mapping exercise should be able to offer guidance on where and how to best take action. The creative sector itself ideally needs to be involved in the subsequent design of the policy, probably through networks such as trade associations.

Some thought should also be given to how any policy initiative is to be evaluated. In Britain, considerable efforts have been made in the last few years to devise ways of measuring the economic, social and cultural impact of policy initiatives. This is underpinned by the belief that it is only by gathering evidence all the way through a process that the true merit of policies can be assessed and communicated, and the lessons learned.



## STEP 7 / HOW CAN MOMENTUM BE MAINTAINED?

So, the mapping work has been completed, a report has been produced and the findings have been explained to key audiences. How, then, can momentum be maintained to stop the mapping exercise becoming a 'one-off' that is left gathering dust on a shelf?

The secret is **persistence**. Raising the profile of the creative industries takes time. Even in Britain, where the term has been in use for more than a decade, it is still quite common to come across public-sector officials or private-sector businesspeople who are unfamiliar with it. A mapping exercise is only the start of a process which may take many

years to achieve significant changes in policy. With this in mind, here are five recommendations:

### Take a long-term view

The British experience suggests that a new concept such as the creative industries will take some while to be embraced. It will encounter scepticism in some quarters, and policymakers may have more urgent priorities at any given time. Sponsors and researchers need to take the long view.

### Keep collecting information and publish it widely

The more data that is collected, the more accurate can be the picture that is painted. The creative industries cluster in certain places, and different cities

and regions have different mixes of the industries. A better understanding of this variation will help to make a more persuasive case to policymakers.

The researchers should also strive to publish their research where possible. This will help to raise the profile of the work, and allow future researchers to draw on their experiences. It may be possible to create public repositories for such work: City University in London has just set up the Researching Cultural and Creative Industries in London (RCCIL) database to make summaries of mapping and other research reports on creative industries in the city freely available.

### Ensure creative industries stay in the news

Celebrating the successes of the creative industries is an important part of maintaining interest in them. This can be done in a number of ways, ranging from festivals to award ceremonies to hosting international cultural events.

### Engage with international creative economy expertise

The creative economy's value has been recognised by international agencies from the United Nations to the (British) Commonwealth. There are also a host of public bodies – not least, of course, the British Council – and informal (and online) networks to plug into. Researchers can draw on these wider international connections for support and advice.

### Engage the sector

Use networks and intermediary agencies such as trade associations and creative business incubators

to make sure the creative sector is engaged in the mapping process. They can help 'sense check' the research's findings and provide interesting case studies. If there are no intermediary or representative agencies in place, the mapping exercise could be a first step in establishing these so that the sector can continue to raise the profile of the creative industries.

#### Notes/

11. BOP Consulting (2006) Creative Economy Programme: the International Perspective.
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14. BOP Consulting (2009) Creative Clusters Conference Report 2009, Creative Clusters.
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16. Rose, C. (2009) Arts Professional, 'The Art of Politics' 21 Sept.
17. Impacts '08 (2010) Creating an impact: Liverpool's experience as European Capital of Culture, Impacts '08, Liverpool.
18. BOP Consulting, MIPC and NESTA (2006) Creating growth: how the UK can develop world class creative businesses
19. BOP Consulting (2007), Screen, Image and Sound Cluster – Impact Study, Advantage West Midlands.
20. AMERU (Wits University) and CAJ (2008) Gauteng's Creative Industries: An Analysis, Gauteng Department of Sports, Arts, Culture and Recreation, Johannesburg, p182.
21. BOP Consulting (2006) Creative Economy Programme: the International Perspective.



## 4/ WHERE NEXT?

We hope this toolkit has provided a useful overview of the purposes, challenges and opportunities of a mapping project. It is, however, only a guide, and anyone thinking about such an exercise should read more deeply on the subject and consult organisations with relevant expertise. This section of the toolkit therefore includes lists of suggested further reading and organisations with specialist knowledge of the creative industries/economy.

### Further reading

DCMS, *Creative Industries Economic Estimates*, published annually since 2002, available online at [www.culture.gov.uk](http://www.culture.gov.uk)

Detailed analysis of the economic performance of the creative industries in Britain, with data series going back to 1997.

DCMS (1998), *Creative Industries Mapping Document 1998*, DCMS, London

DCMS (2001), *Creative Industries Mapping Document 2001*, DCMS, London

These two studies provided the first detailed guides to the creative industries in Britain, and have shaped much of the subsequent debate around the creative industries both in Britain and internationally.

Evans, Graeme and Gertler, Meric (2006), *Strategies for Creative Spaces*, London Development Agency/ Governments of the city of Toronto and the province of Ontario

Wide-ranging study of six cities in Europe and North America that aimed to identify strategies for enhancing the growth and development of creative industries at city level.

Florida, Richard (2002), *The Rise of the Creative Class*, Basic Books, New York

While Florida uses the term 'creative' rather differently from the DCMS – he refers to workers who have some autonomy to make their own decisions about what they do and how they do it – his work has nonetheless become mixed-up with the arguments around the role of the creative economy, and in particular have affected the discussions around 'creative cities'.

Howkins, John (2001), *The Creative Economy*, Penguin, London

Influential early study of the creative economy, which did much to draw attention to the growing economic importance of intellectual property.

KEA European Affairs (2006), *The Economy of Culture in Europe*, European Commission

First Europe-wide study of the creative economy carried out on behalf of the Commission.

Landry, Charles (2000) *The Creative City: A Toolkit for Urban Innovators*, London, Earthscan

Exploration of the role of creativity in urban innovation and regeneration.

Ministry of Culture – Republic of Colombia (2007), *Guide to Producing Regional Mappings of the Creative Industries*, Ministry of Culture, Bogotá  
Detailed guide to conducting a regional creative industries mapping, drawing on Colombian experience.

UNESCO Institute of Statistics (2009), *2009 UNESCO Framework for Cultural Statistics*, UNESCO Institute of Statistics, Montreal

Revision of UNESCO's cultural statistics framework – the first such since 1986 – to reflect the changing nature of the cultural and creative sectors.

United Nations (2008), *Creative Economy Report 2008: The Challenge of Assessing the Creative Economy: towards informed Policy-making*, United Nations, Geneva

More than 300 pages of definitions, statistics and analysis of the global creative economy – probably the most detailed study yet carried out at a global level.

### Selected organisations

The list below gives links to a number of government and non-governmental organisations from the UK and across the world which are particularly interested in the creative industries/economy.

#### • British-based organisations

British Council's Creative Economy Unit:  
[www.creativeeconomy.org.uk](http://www.creativeeconomy.org.uk)

Commonwealth Secretariat:  
[www.thecommonwealth.org](http://www.thecommonwealth.org)

Department for Culture, Media and Sport (DCMS): [www.culture.gov.uk](http://www.culture.gov.uk)

National Endowment for Science, Technology and the Arts (NESTA):  
[www.nesta.org.uk](http://www.nesta.org.uk)

UK Trade & Investment:  
[www.uktradeinvest.gov.uk](http://www.uktradeinvest.gov.uk)

#### • International organisations

United Nations Conference on Trade and Development (UNCTAD): [www.unctad.org](http://www.unctad.org)

United Nations Educational, Scientific and Cultural Organisation (UNESCO):  
[www.unesco.org](http://www.unesco.org)

World Intellectual Property Organisation (WIPO): [www.wipo.int](http://www.wipo.int)







# APPENDIX 1 - THE BRITISH COUNCIL'S CREATIVE ECONOMY UNIT

The British Council is the UK's international organisation for cultural relations and educational opportunities and is represented in 110 countries worldwide. The British Council connects people worldwide with creative ideas and learning opportunities from the UK and builds lasting relationships between Britain and other countries. The Creative Economy Unit was established in 1999 as part of the Arts Department to work with the UK's creative sectors and to develop a programme of work that would share the UK's experience of developing the creative economy and the wider impact of this process in terms of education, social inclusion, economic regeneration, and international engagement.



The Creative and Cultural Economy Programme works in the following five primary strands:

## 1. Policy and mapping

Effective policy-making is essential for the development of a sustainable and competitive creative economy. The structure around which the creative economy develops is shaped by a series of government interventions, from IP regulations to tax regimes and education policies. This is also the framework in which cultural relations take place.

Through this strand of work, the British Council seeks to promote the global discussion and sharing of appropriate policy initiatives and perspectives, in recognition that the creative economy is both a global and a local phenomenon.

Initiatives so far have included:

- **International Issues seminars:** a global seminar programme that revolves around specific policy issues (IP, education, etc.), running discussions at several places during a year. During 2010, a series of seminars on the status and future of copyright will take place in the UK, China, Colombia, India, Poland, and South Africa.
- **Mapping:** an awareness raising programme on the importance of mapping exercises for the better understanding of the policy needs for different creative sectors. The programme also supports mapping exercises in consultation with UK and international experts.
- **Toolkits:** development and distribution of resources on creative economy-related issues around the world.



## 2. Skills and Infrastructure

Skills and infrastructure are essential to nurture the creative economy's growth and sustainability. The programme of activities includes:

- **Media training:** developing the skills and understanding of journalists so that they can better report on the business of the creative economy.
- **Infrastructure:** assisting the development of intermediary agencies that seek to provide tailored information and support to creative businesses.
- **Business Skills:** delivery of training programmes for young creative business owners that seek to develop their business and sector-specific skills.

## 3. Creative entrepreneurship and networks

Creative entrepreneurs are pivotal figures for the creative economy: by bridging the gap between artists and consumers, they drive forward the economic and cultural development of societies. This strand of the programme seeks to raise their profile, celebrate their achievements, and recognise their importance in informing policy-making for the creative sector. This strand's initiatives include:

- **Young Creative Entrepreneur (YCE) Clubs and networks:** development of local and regional Clubs of creative entrepreneurs and cultural leaders – mainly identified through the Young Creative Entrepreneur awards' scheme's selection process. Club and network activities include seminars, dialogues with policy-makers, masterclasses, and networking events to share information, discuss pressing issues and business opportunities.
- **International Young Creative Entrepreneur (IYCE) awards' scheme:** an annual programme of awards, which sees groups of young creative entrepreneurs from emerging economies visit the UK for a study tour of their industry, taking part in a major trade event, and compete for the title. Over 50 countries have taken part in the programme so far.

- **UK Young Creative Entrepreneur (UKYCE) awards' scheme:** an annual programme of awards for British young creative entrepreneurs. Groups of finalists travel overseas to an emerging economy to take part in a study tour of their sector, and compete for the title in the UK in front a judging panel. Argentina, Poland, India, Indonesia, South Africa, China and Turkey have all hosted award groups so far.

## 4. Leadership and Cultural Relations

As a cultural relations agency, the British Council seeks to engage the new generation of cultural leaders with key stakeholders around the world in the discussion and development of common strategies to tackle global cultural issues. The aim is to renew the role of the cultural sector in addressing global issues. The programme will also integrate practitioners from a wide spectrum of sectors outside the arts (science, education, sports, etc.) in order to create cross-sectoral collaborations.

## 5. Insight and Intelligence

Development of a platform for the collection and discussion of issues around the creative economy, stimulated by the information and interaction generated by the British Council's creative economy activities and networks.

For more information on these activities, please visit [www.creativeeconomy.org.uk](http://www.creativeeconomy.org.uk)



## APPENDIX 2 - CREATIVE INDUSTRY SIC CODES

SUB-SECTOR	SIC CODE	DESCRIPTION	PROPORTION OF CODE TAKEN
Advertising	74.40	Advertising	All
Architecture	74.20	Architecture and engineering activities and related technical consultancy	25%
Art and Antiques	52.48	Other retail sale in specialised stores	5%
	52.50	Retail sale of second-hand goods in store	5%
Crafts	Majority of businesses too small to be picked up in business surveys		
Design	No codes match this sector		
Designer Fashion	Nine codes	Clothing manufacture	0.5%
	74.87	Other business activities not elsewhere classified	2.5%
Video, Film and Photography	22.32	Reproduction of video recording	25%
	74.81	Photographic activities	25%
	92.11	Motion picture and video production	All
	92.12	Motion picture and video distribution	All
	92.13	Motion picture projection	All
Music and the Visual & Performing Arts	22.14	Publishing of sound recordings	All
	22.31	Reproduction of sound recording	25%
	92.31	Artistic and literary creation and interpretation	All
	92.32	Operation of arts facilities	All
	92.34	Other entertainment activities not elsewhere classified	50%
	92.72	Other recreational activities not elsewhere classified	25%

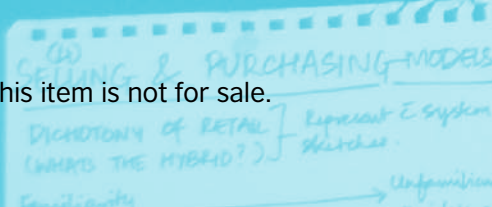
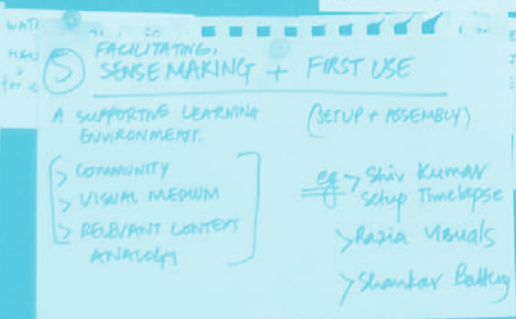
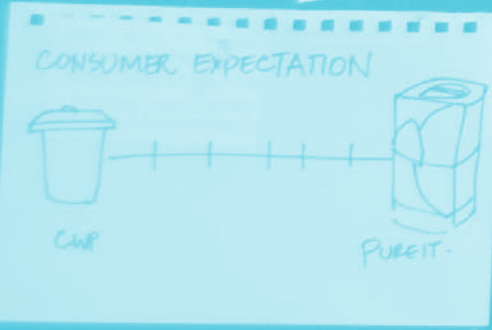
SUB-SECTOR	SIC CODE	DESCRIPTION	PROPORTION OF CODE TAKEN
Publishing	22.11	Publishing of books	All
	22.12	Publishing of newspapers	All
	22.13	Publishing of journals and periodicals	All
	22.15	Other publishing	25%
Software, Computer Games & Electronic Publishing	92.40	News agency activities	All
	22.33	Reproduction of computer media	25%
	72.21	Publishing of software	All
Radio and TV	72.22	Other software consultancy and supply	All
	92.20	Radio and television activities	All





All around the world, the 'creative economy' is talked about as an important and growing part of the global economy. Governments and creative sectors across the world are increasingly recognising its importance as a generator of jobs, wealth and cultural engagement.

The UK has been a leader in the development of this agenda, not just as a driver of the economy but also promoting social inclusion, diversity and development. This booklet (and the series it is part of) is a contribution to our shared knowledge and expertise for this emergent and valuable sector.



This item is not for sale.