



Department  
for Culture  
Media & Sport

# Creative Industries: Focus on Exports of Services

June 2016

*These estimates are Official Statistics and have been produced to the standards set out in the Code of Practice for Official Statistics*

# Contents

---

<b>Chapter 1 - Introduction.....</b>	<b>4</b>
<b>Chapter 2 - Key findings .....</b>	<b>5</b>
<b>Chapter 3 - Exports of Services (2009-2014).....</b>	<b>6</b>
3.1 <i>Exports of services for the UK Creative Industries .....</i>	<i>6</i>
3.2 <i>Estimates by Creative Industries Group .....</i>	<i>8</i>
3.3 <i>Estimates by continent .....</i>	<i>10</i>
3.4 <i>Estimates by market of interest .....</i>	<i>11</i>
<b>Chapter 4 - Summary and Next Steps .....</b>	<b>13</b>
<b>Annex A: Creative Industries .....</b>	<b>14</b>
<b>Annex B: Background Note.....</b>	<b>16</b>

# Chapter 1 - Introduction

---

This report provides estimates of the value of services exported by the UK Creative Industries for 2009 to 2014. It complements the [GVA estimates](#) published in January 2016 and the employment estimates for the Creative Industries published alongside this report. It includes Exports of Services by Creative Industries Group (section 3.2) by continent (section 3.3) and by key markets of interest (section 3.4).

The Creative Industries were defined in the [Government's 2001 Creative Industries Mapping Document](#) as “those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property”.

The methodology used to determine which industries are considered “creative” is set out in the [Creative Industries Economic Estimates Methodology Note](#). It is based on the principle of “creative intensity” and essentially comprises three steps.

1. Identification of creative occupations<sup>1</sup>.
2. Calculate proportion of creative jobs for each industry (creative intensity).
3. Industries with creative intensity above a specified threshold are considered Creative Industries.

Creative Industries (and groups) and the creative intensity of each industry are set out in Annex A of this report.

Exports of Services are measured using Office for National Statistics (ONS) [International Trade in Services \(ITIS\)](#) data. These are based on a survey of just under 15,000 UK businesses, and record the value of the services which businesses export, as well as the country that they are exported to. The [ONS Pink Book](#) is used to obtain the UK total exports of services, and revisions to these total figures are in line with the Pink Book. This report looks at Exports of Services from the Creative Industries only, and does not consider Exports of Services from the wider Creative Economy. Results are in current prices (i.e. are not adjusted for inflation).

For context, the number of exporting and importing enterprises in GB are available as an [ONS ad-hoc statistical release](#). These companies may export goods or services.

DCMS recently consulted on a number of aspects of these economic estimates and a summary of views and DCMS proposals have been published [here](#). This includes further information on the proposals for exports of goods, which DCMS aims to publish in December 2016.

---

<sup>1</sup> Bakhshi et al (2013) propose criteria which can be used to assess which occupation codes should be considered creative for measurement purposes.

# Chapter 2 - Key findings

---

## Summary

- The value of services exported by the UK Creative Industries in 2014 was £19.8bn, an increase of 10.9 per cent from 2013.
- Exports of services from the Creative Industries accounted for 9.0 per cent of total exports of services from the UK in 2014.

## By Creative Industries Group

- In 2014, exports of services from the 'IT, software and computer services' was responsible for the largest proportion of service exports from the Creative Industries (44.6 per cent).
- Exports of services from the 'Film, TV, video, radio and photography' industry were the second largest proportion in 2014 (accounting for 23.8 per cent).
- 'Publishing' had the greatest percentage increase between 2013 and 2014, increasing by 62.8 per cent to £2.1bn.

## By continent and market of interest

- Europe was the continent in receipt of the majority of exports of services from the UK Creative Industries in 2014, with 57.3 per cent of the total exports of services by UK Creative Industries (£11.4bn).
- The USA was the market of interest in receipt of the greatest proportion of exports of services from the UK Creative Industries in 2014, with 25.3 per cent of the total exports of services by UK Creative Industries (£5.0bn).

# Chapter 3 - Exports of Services (2009-2014)

## 3.1 Exports of services for the UK Creative Industries

In 2014 the value of services exported by the UK Creative Industries was £19.8bn, an increase of 10.9 per cent since 2013 and 48.9 per cent since 2009 (an increase of £2.0bn and £6.5bn respectively). In the same period the value of services exported by all UK industries was £ 219.8bn, an increase of 2.3 per cent since 2013 and 29.6 per cent since 2009.

Exports of services from the Creative Industries accounted for 9.0 per cent of total exports of services for the UK in 2014, a higher proportion than in 2013 (8.3 per cent) and 2009 (7.8 per cent). A further breakdown of the 2014 data by 4 digit SIC (Standard Industrial Classification) code are available in the accompanying tables.

**Table 1: Exports of Services for UK Creative Industries<sup>2</sup>**

Creative Industries Group	Exports (£m)					
	2009	2010	2011	2012	2013	2014
Advertising and marketing	2,136	1,861	2,013	2,343	2,641	2,771
Architecture	319	384	362	373	359	446
Crafts	-	-	-	-	-	-
Design: product, graphic and fashion design	116	122	131	190	204	226
Film, TV, video, radio and photography	3,826	4,658	4,257	4,345	4,034	4,724
IT, software and computer services	5,811	6,286	7,210	8,011	8,589	8,833
Publishing	806	1,032	1,245	1,415	1,315	2,142
Museums, galleries and libraries	-	-	-	-	-	-
Music, performing and visual arts	286	357	275	574	704	644
<b>Creative Industries Total</b>	<b>13,303</b>	<b>14,719</b>	<b>15,503</b>	<b>17,258</b>	<b>17,856</b>	<b>19,809</b>
<b>UK Total (ONS Balance of Payments, Pink Book)</b>	<b>169,507</b>	<b>174,178</b>	<b>188,908</b>	<b>197,432</b>	<b>214,813</b>	<b>219,759</b>
<b>Creative Industries as a percentage of UK Total</b>	<b>7.8%</b>	<b>8.5%</b>	<b>8.2%</b>	<b>8.7%</b>	<b>8.3%</b>	<b>9.0%</b>

### Notes

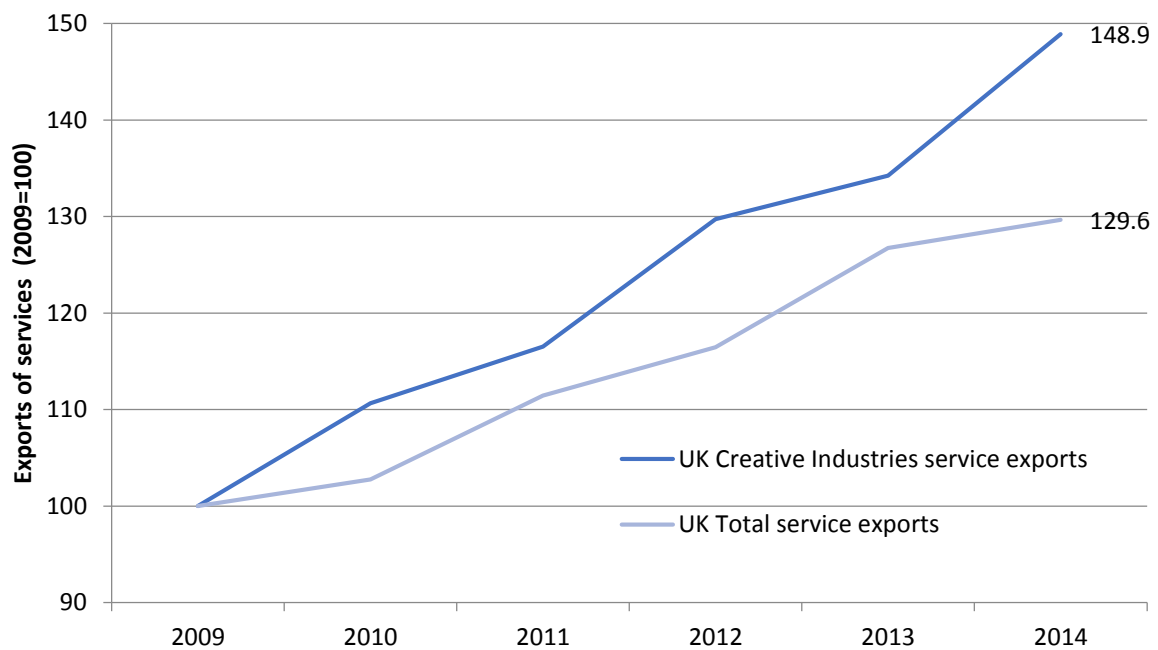
1. Data are in current prices and therefore have not been adjusted for inflation.
2. Some data have been suppressed due to disclosiveness.

<sup>2</sup> Revisions to the UK total are in line with changes in the ONS Pink Book, and are the most recent figures.

The largest growth in the value of exports of service for the UK Creative Industries was observed between 2011 and 2012, when the value increased by 11.3 per cent. In the same period the value for all UK service exports increased by 4.5 per cent.

The percentage increase from the UK Creative Industries between 2009 and 2014 was greater than the total UK, as demonstrated in Figure 1. Between 2013 and 2014, exports from the Creative Industries increased at more than four times the rate of the UK total.

**Figure 1: Changes in Exports of Services indexed to 2009 = 100 (2009 – 2014)**



## 3.2 Estimates by Creative Industries Group

In 2014, exports of services from 'IT, software and computer services' accounted for the largest proportion of all Creative Industries exports of services (44.6 per cent). This was down from 48.1 per cent in 2013, however an increase from 43.7 per cent in 2009. Exports of services in this sector increased from £5.8bn in 2009 to £8.8bn in 2014.

Exports of services from the 'Film, TV, video, radio and photography' group accounted for just under a quarter of the Creative Industries total (23.8 per cent) and exports of services from 'Advertising and marketing' were responsible for a further 14.0 per cent of the Creative Industries total exports of services.

The group which grew by the largest percentage between 2013 and 2014 was 'Publishing', increasing by 62.8 per cent during this time period, taking the value of exports of services from 'Publishing' from £1.3bn in 2013 to £2.1bn in 2014<sup>3</sup>. 'Music, performing and visual arts' was the only group that did not see an increase between 2013 and 2014 (decreasing by 8.5 per cent).

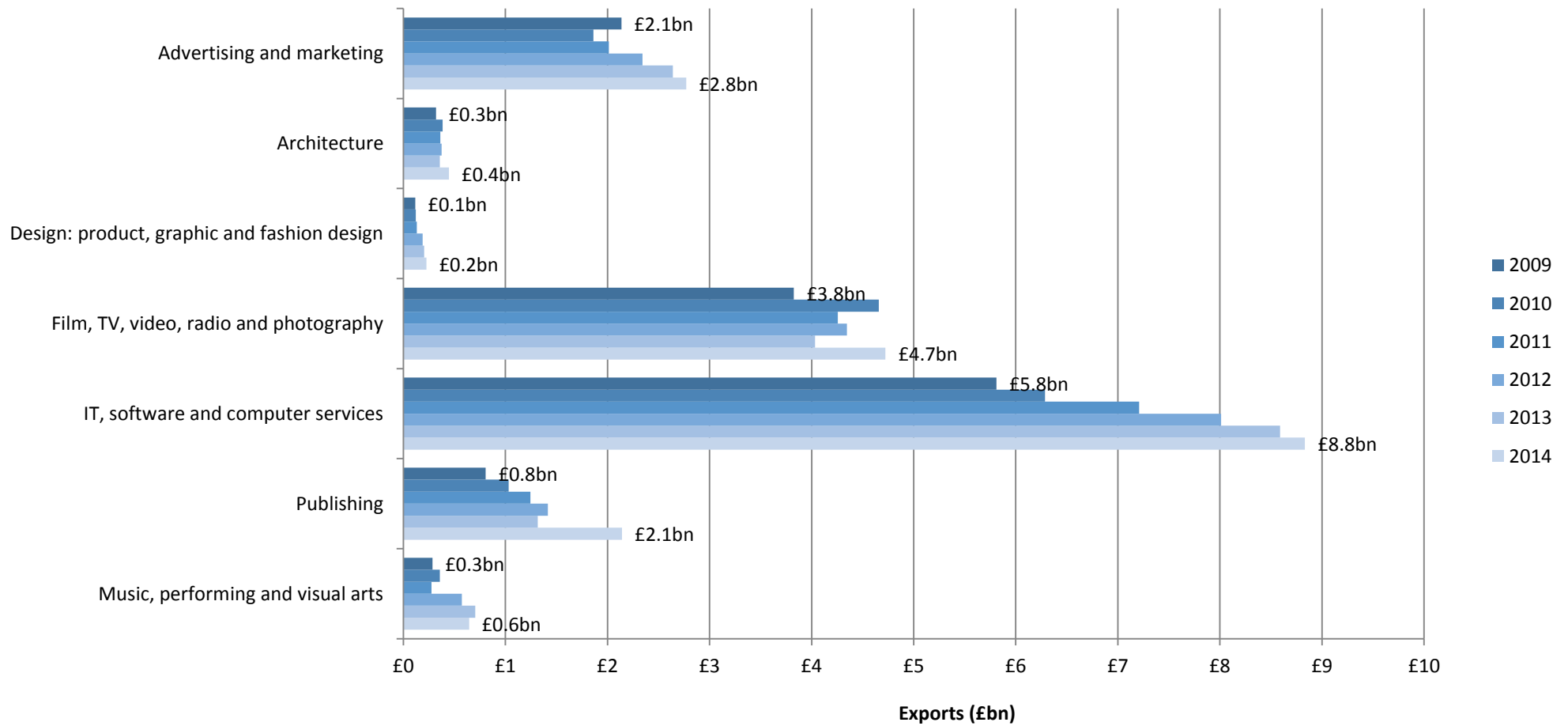
---

<sup>3</sup> This increase was largely due to SIC codes 58.11 and 58.14, who had a greater number of enterprises and reporting units.



Figure 2: Value of Exports of Services (2009 – 2014)

### Service Exports of Creative Industries



### 3.3 Estimates by continent

In 2014 Europe was the continent in receipt of the majority of exports of service from the UK Creative Industries with 57.3 per cent of the total value of exports of services (£11.4bn). A further 27.9 per cent of the total exports of services went to America<sup>4</sup> (£5.5bn) and 10.3 per cent to Asia (£2.0bn).

**Table 2: Exports of Services for UK Creative Industries by continent and Creative Industries Group, 2014<sup>5</sup>**

Creative Industries Group	Exports (£m)					
	Europe	America	Asia	Australia	Africa	Industry total
Advertising and marketing	1,987.2	489.5	227.1	15.2	15.3	2,770.8
Architecture	71.0	81.5	261.5	5.6	26.7	446.2
Crafts	-	-	-	-	-	-
Design: product, graphic and fashion design	125.2	42.7	42.6	3.1	12.4	226.1
Film, TV, video, radio and photography	2,685.0	1,459.3	310.9	91.9	145.0	4,723.8
IT, software and computer services	5,227.8	2,534.6	733.2	161.3	139.8	8,833.5
Publishing	892.2	732.5	378.9	59.9	63.1	2,141.5
Museums, galleries and libraries	-	-	-	-	-	-
Music, performing and visual arts	361.7	173.1	80.7	18.6	4.6	644.2
<b>Total Creative Industries Exports of Services</b>	<b>11,355.9</b>	<b>5,526.4</b>	<b>2,039.0</b>	<b>355.9</b>	<b>406.8</b>	<b>19,809.4</b>

#### Notes

1. Data are in current prices and therefore have not been adjusted for inflation.
2. Some data have been suppressed due to disclosiveness.

Exports of services from the 'IT, software and computer services' group made up the majority of receipts for each continent, except Africa (where it was just behind 'Film, TV, video, radio and photography'). The continent where the 'IT, software and computer services' made up the largest proportion was Europe (£5.2bn and 46.0 per cent), followed by America (£2.5bn and 45.9 per cent).

<sup>4</sup> America includes both North and South America.

<sup>5</sup> Exports do not sum to total industry exports, due to the omission of some areas.

The 'Film, TV, video, radio and photography' group also made up a large proportion of exports of services from the UK Creative Industries in each continent, and its largest proportions were in Africa and Australia. In Africa £0.15bn (35.6 per cent) of exports of services from the UK Creative Industries were from this sector, and £0.09bn were from Australia (25.8 per cent).

### 3.4 Estimates by market of interest

In 2014, the USA was the market of interest responsible for the largest proportion of exports of services from the UK Creative Industries (£5.0bn, 25.3 per cent of the total value of exports of services). This was followed by Germany (£1.1bn, 5.5 per cent of the total value of exports of services).

Again, exports of services from the 'IT, software and computer services' group made up the majority of receipts for all markets of interests, aside from the United Arab Emirates where it was second to 'Film, TV, video, radio and photography'. India was the market of interest where the 'IT, software and computer services' accounted for the largest proportion (50.8 per cent, £8.8bn), closely followed by France (50.1 per cent, £48.6bn).

The 'Film, TV, video, radio and photography' group was also responsible for a large proportion of the receipts for all markets of interest. Over one third (33.8 per cent) of receipts from the United Arab Emirates were from this sector, and over one quarter (27.5 per cent) were from the USA.

Breakdowns for all markets of interest by Creative Industries group are shown in Table 3.

**Table 3: Exports of Services for UK Creative Industries by continent and Creative Industries Group, 2014**

Creative Industries Group	Exports (£m)									
	USA	Germany	France	Japan	China	UAE	India	Hong Kong	South Korea	Industry Total
Advertising and marketing	432.7	200.3	155.8	99.6	11.3	18.5	8.6	8.9	34.1	2,770.8
Architecture	64.9	3.3	6.3	0.2	58.5	19.5	4.6	-	-	446.2
Crafts	-	-	-	-	-	-	-	-	-	-
Design: product, graphic and fashion design	36.4	17.9	7.9	1.6	4.8	4.3	1.2	4.9	0.3	226.1
Film, TV, video, radio and photography	1,376.0	155.4	177.7	16.9	9.0	69.1	24.6	12.6	13.4	4,723.8
IT, software and computer services	2,277.8	506.3	486.3	95.1	60.0	60.4	88.4	55.5	55.5	8,833.5
Publishing	646.0	163.8	105.1	58.8	57.6	24.5	29.2	53.5	17.8	2,141.5
Museums, galleries and libraries	-	-	-	-	-	-	-	-	-	-
Music, performing and visual arts	156.6	43.2	30.1	12.6	2.3	8.1	**	6.5	14.0	644.2
<b>Creative Industries Total</b>	<b>5,002.8</b>	<b>1,091.8</b>	<b>969.9</b>	<b>286.5</b>	<b>205.0</b>	<b>204.5</b>	<b>173.9</b>	<b>163.7</b>	<b>137.3</b>	<b>19,809.4</b>

**Notes**

1. Data are in current prices and therefore have not been adjusted for inflation.
2. Some data have been suppressed due to disclosiveness.

# Chapter 4 - Summary and Next Steps

---

This report shows the importance of the Creative Industries to the UK economy. They continue to be one of the strongest performing parts of the economy, growing at a faster pace than the UK economy as a whole between 2014 and 2015. Between 2014 and 2015 the Creative Industries increased by 10.9 per cent, whereas the UK economy grew by 2.3 per cent.

In an effort to continually improve quality and better meet user needs, DCMS is looking to further develop economic estimates for the Creative Industries in a number of areas. The Creative Industries user consultation ran from 26th January until the 26th April 2016. This covered a series of proposed developments to the Creative Industries methodology and analysis. A summary of responses received and the DCMS response have been published in a report [here](#).

## Productivity

DCMS plan to look at the three approaches to productivity used by ONS: per worker, per job and per hour. The productivity per hour approach is preferred as the best reflection of productivity and will be the focus of development work. For accurate measures of productivity it is important to have a measure of output (in this case GVA) which has been adjusted for inflation (constant prices), otherwise changes in productivity may in fact be a result of inflation rather than productivity. DCMS is investigating the viability of getting a robust deflator for the Creative Industries which would also support a robust measure of productivity.

## Export of goods

Feedback from the user consultation and steering groups was that more granularity of the data is desired. DCMS have therefore decided not to publish estimates of exports of goods for the Creative Industries in this publication and will undertake further work to investigate the feasibility of VATMOSS (Value Added Tax Mini One Stop Shop) as a data source. If this is viable, we will undertake further discussions with industries groups to agree a transparent approach to determining what is classified as a creative product. DCMS will aim to publish estimates of exports of goods in December 2016.

The next publication of Creative Industries Economic Estimates will be estimates of GVA (for 2015), due to be published in December 2016. The next series of “Focus on” reports covering employment and exports will be published in June 2017.

# Annex A: Creative Industries

The “creative intensity” of each 4-digit Standard Industrial Classification 2007 (SIC) code was calculated and used to inform the identification of “creative” industries from other industries in the economy. These have been split into a number of ‘Creative Industries Groups’, which can be seen in the below table.

<b>Creative Industries Group</b>	<b>SIC</b>	<b>Description</b>
<b>Advertising and marketing</b>	70.21	Public relations and communication activities
	73.11	Advertising agencies
	73.12	Media representation
<b>Architecture</b>	71.11	Architectural activities
<b>Crafts</b>	32.12	Manufacture of jewellery and related articles
<b>Design: product, graphic and fashion design</b>	74.10	Specialised design activities
<b>Film, TV, video, radio and photography</b>	59.11	Motion picture, video and television programme production activities
	59.12	Motion picture, video and television programme post-production
	59.13	Motion picture, video and television programme distribution
	59.14	Motion picture projection activities
	60.10	Radio broadcasting
	60.20	Television programming and broadcasting activities
	74.20	Photographic activities
<b>IT, software and computer services</b>	58.21	Publishing of computer games
	58.29	Other software publishing
	62.01	Computer programming activities
	62.02	Computer consultancy activities
<b>Publishing</b>	58.11	Book publishing
	58.12	Publishing of directories and mailing lists
	58.13	Publishing of newspapers
	58.14	Publishing of journals and periodicals
	58.19	Other publishing activities
	74.30	Translation and interpretation activities
<b>Museums, galleries and libraries</b>	91.01	Library and archive activities
	91.02	Museum activities
<b>Music, performing and visual arts</b>	59.20	Sound recording and music publishing activities
	85.52	Cultural education
	90.01	Performing arts
	90.02	Support activities to performing arts
	90.03	Artistic creation
	90.04	Operation of arts facilities

The “creative intensity”, calculated on 2011 and 2012 data, for each SIC code included in these estimates is shown in the table below.

SIC	Description	Creative Intensity (%)
90.03	Artistic creation	91.5
74.30	Translation and interpretation activities	82.2
90.01	Performing arts	78.8
74.20	Photographic activities	77.8
60.10	Radio broadcasting	62.7
74.10	Specialised design activities	62.1
71.11	Architectural activities	61.5
70.21	Public relations and communication activities	59.3
58.14	Publishing of journals and periodicals	58.3
90.02	Support activities to performing arts	56.8
59.1	Motion picture, video and television programme activities	56.4
32.12	Manufacture of jewellery and related articles	56.2
62.01	Computer programming activities	55.8
59.20	Sound recording and music publishing activities	54.1
60.20	Television programming and broadcasting activities	53.5
73.11	Advertising agencies	50.5
58.11	Book publishing	49.9
58.13	Publishing of newspapers	48.8
73.12	Media representation	48.3
58.21	Publishing of computer games	43.1
58.29	Other software publishing	40.8
90.04	Operation of arts facilities	38.4
58.19	Other publishing activities	37.8
85.52	Cultural education	34.6
62.02	Computer consultancy activities	32.8
58.12	Publishing of directories and mailing lists	31.0
91.01	Library and archive activities	23.8
91.02	Museum activities	22.5

**Notes:**

1. Creative intensity for SIC 59.1 is calculated at 3-digit level in order to capture the whole industry as data at the 4-digit level are not statistically robust (due to low levels of employment of the 4-digit codes).
2. SIC codes 91.01 and 91.02 have been included after consultation, despite having creative intensities below the 30 per cent threshold. One reason they may have a lower creative intensity is due to large numbers employed in facilities maintenance in Museums, galleries and libraries.
3. SIC code 32.12 (Manufacture of jewellery and related articles) has been included after consultation to represent the Crafts industry. Due to limitations in the underlying SIC codes (which are agreed internationally) this clearly does not fully capture the crafts sector.
4. Further information industry codes can be found in [the consultation response](#).

# Annex B: Background Note

---

1. The next update of these statistics will be published in June 2017, including estimates of exports of services for 2015.
2. For further information on employment, see the corresponding release in this series. The latest GVA estimates are available [here](#). Any ad-hoc releases relating to the Creative Industries will be published [here](#).
3. The responsible statistician for this release is Becky Woods. For enquiries on this release please contact Becky on 0207 211 6214 or [evidence@culture.gov.uk](mailto:evidence@culture.gov.uk).
4. For general enquiries contact:  
Department for Culture Media and Sport,  
100 Parliament Street  
London  
SW1A 2BQ  
Telephone: 0207 211 6000
5. DCMS statisticians can be followed on twitter via [@DCMSinsight](#)
6. Sign up for Creative Industries Statistics newsletters is available [here](#).
7. This Creative Industries Focus on Exports release is an Official Statistics release and has been produced to the standards set out in the Code of Practice for Official Statistics. For more information, see <http://www.statisticsauthority.gov.uk/assessment/code-of-practice/code-of-practice-for-official-statistics.pdf>. Details of the pre-release access arrangement for this dataset have been published alongside this release.



© Crown copyright 2016

You may re-use this information (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence.

To view this licence, visit [www.nationalarchives.gov.uk/doc/open-government-licence/](http://www.nationalarchives.gov.uk/doc/open-government-licence/) or write to the Information Policy Team, The National Archives, Kew, London TW9 4DU, or email: [psi@nationalarchives.gsi.gov.uk](mailto:psi@nationalarchives.gsi.gov.uk)



Department  
for Culture  
Media & Sport

4<sup>th</sup> Floor, 100 Parliament Street  
London, SW1A 2BQ  
**GOV.UK/DCMS**