Creative Industries Economic Estimates Statistical Bulletin

October 2007

Introduction

This is the sixth annual Creative Industries Economic Estimates bulletin. The series is the result of development work on official data sources, following a commitment in the 2001 Creative Industries Mapping Document[1] to consider how to provide more timely and consistent data on the activity of the Creative Industries. The Mapping Document, and the previous version in 1998, outlined the sectors comprising the Creative Industries and it is this structure which forms the basis of these bulletins.

The classifications used by international convention for official statistics do not accurately reflect the structure of the Creative Industries and as such it is difficult to capture the full extent of activity. **Due to these constraints the figures throughout the bulletin are *estimates* and are not classed as National Statistics.**

Headline Findings

1. Contribution to the economy – Gross Value Added (Tables 1a and 1b)

- The Creative Industries, excluding Crafts and Design, **accounted for 7.3% of Gross Value Added (GVA) in 2005**[2].

- The Creative Industries **grew by an average of 6% per annum between 1997 and 2005**[3]. This compares to an average of 3% for the whole of the economy over this period.

- Two sectors showed growth above the average across all the Creative Industries: Software, Computer Games & Electronic Publishing (10% p.a.) and Radio & TV (8% p.a.).

2. Exports of services (Table 2)

- Exports of services by the Creative Industries totalled **£14.6 billion in 2005.** This equated to 4.5% of all goods and services exported.

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[1] DCMS, *Creative Industries Mapping Document 2001*.
[2] Crafts and Design cannot be included in the total GVA figure as only turnover estimates are available for these sectors.
[3] Based on the 11 of the 13 creative industries for which trend data is available (i.e. excluding Crafts and Design).

- A third (33%) of the total Creative Industries exports was contributed by the Software, Computer Games & Electronic Publishing sector.

3. Employment (Table 3)

- In the summer quarter of 2006, **creative employment totalled 1.9 million jobs.** This comprised just over 1.1 million jobs in the Creative Industries and almost 800,000 further creative jobs within businesses outside these industries.

- Total creative employment increased from 1.6m in 1997 to 1.9m in 2006, an **average growth rate of 2% per annum**, compared to 1% for the whole of the economy over this period.

- Software, Computer Games & Electronic Publishing showed the largest increase in employment between 1997 and 2006 with an average growth rate of 6% per annum. The Design sector, including Designer Fashion, also showed an increase above the overall average for the Creative Industries over the period (4% per annum).

4. Numbers of businesses (Table 4)

- In 2006, there were an estimated **120,700 businesses** in the Creative Industries on the Inter-Departmental Business Register (IDBR). This represents **7.3% of all companies** on the IDBR, although the true proportion of enterprises that are in the Creative Industries is likely to be higher as certain sectors such as Crafts contain predominantly small businesses - see Annex C for further detail.

- Around two-thirds of the businesses in the Creative Industries are contained within two sectors; Software, Computer Games and Electronic Publishing (53,500 companies) and Music and the Visual & Performing Arts (28,300 companies).

NOTES

Revisions

Since the last bulletin (published September 2006) some revisions have been made in methodology and chosen source data, along with some updates to previous years' data.

The data source for Design industry **turnover** has changed from British Design Innovation's (BDI) "Design Industry Valuation Survey" to the Design Council's "The Business of Design". BDI data is based on a membership survey and concerns were raised that the data may fluctuate according to membership levels rather than industry-wide trends. The Design Council data also reflects a wider definition of the Design industry, including freelance designers and in-house design teams instead of just design consultancies. Rather than create a discontinuity in the data, a new series has been started for Design using data from the Design Council which is planned to be updated every three years. The old BDI data has been removed from the series. However, the estimate of Design exports (Table 2) uses the BDI data as it is still considered to be the best available source.

Along with a change in the data source for Design there has been a revision to the method used for calculating the Creative Industries total GVA and contribution to UK GVA. In previous bulletins the estimate of Design industry turnover was added to the GVA contributions of other sectors to produce the total figures. This is because it is not possible to identify Design in national statistical sources which are used to calculate GVA, meaning an estimate of turnover has to be used as a closest proxy. However, turnover and GVA are not directly comparable measures as turnover will always be larger than GVA[4]. Previous estimates of total Creative Industries GVA acknowledged this fact and may have resulted in a slight overestimation. Alongside the change in source for the estimate of Design industry turnover, the decision has been taken to exclude the sector from the estimate of total Creative Industries GVA (as had previously been the case for the Crafts sector). Instead the turnover figure is presented separately at the end of the GVA table.

See Annex B for further details of the revisions, including the impact on the backdated series.

Interpretation of the figures

All readers should be aware that:

1. **All figures are estimates** since they draw on fixed assumptions of the correspondence between the definitions of the Creative Industries and the definitions used in official sources. These are shown in Annex A.

2. As far as possible National Statistics (NS) sources are used as the basis for the estimates to ensure consistency and hence comparability between sectors. Where NS data are not available other research has been used which may not have been subjected to the same quality checks. It therefore follows that these estimates, and some of the overall totals which may include these estimates, may not be as reliable as National Statistics.

3. With the exception of the number of businesses counts, sources are sample surveys. These data are thus subject to sampling errors, in particular when sample sizes are small for the detailed classifications. Therefore too much **emphasis should not be placed on fluctuations** in the figures.

4. Due to the structure of the official classifications used, it is necessary to combine 'Interactive Leisure Software' with 'Software and Computer Services' and 'Music' with 'Performing Arts' to produce these estimates.

5. All tables are for the UK, with the exception of Table 3 (employment) which relates to Great Britain.

Future work

Although there has been a revision to the methodology used with regards to Design and its contribution to total figures, this bulletin retains broadly the same framework for measuring the Creative Industries as in previous years. However, this framework is currently under review and DCMS has been consulting on proposed changes through the publication of an evidence review early in September. In particular DCMS has investigated the possibility of a supply chain approach to identify different stages of the creative process within each sector. More details can be found at http://www.cep.culture.gov.uk/cepevidence2007.

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[4] See Annex B for further explanation

Any framework changes will be undertaken with consideration of the forthcoming changes to the Standard Industrial Classification structure (SIC 2007).

The evidence publication and review of bulletin methodology form part of the wider Creative Economy Programme (CEP), launched by DCMS in November 2005. The CEP aims to better understand the role the Creative Industries may play in the future of the UK economy and what role Government has in supporting these industries. For more information, see www.cep.culture.gov.uk.

Table 1a - Gross Value Added (GVA) of the Creative Industries, UK

	Advertising	Architecture	Art & Antiques	Designer Fashion	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL** (excl. Crafts and Design)[1]	Crafts [2]	Design [2]
GVA at current prices (£ million)												
1997	3,400	3,100	260	280	1,900	2,700	6,500	9,800	3,500	**31,500**	n/a	n/a
1998	3,500	3,200	270	270	1,800	2,900	7,300	13,200	3,700	**36,300**	400	n/a
1999	5,500	3,200	320	300	2,100	3,100	8,000	13,900	4,600	**41,000**	n/a	n/a
2000	6,100	3,500	350	360	2,100	3,200	8,400	14,800	5,900	**44,800**	n/a	n/a
2001	5,500	3,600	390	320	1,800	3,100	8,800	16,300	6,700	**46,600**	n/a	n/a
2002	5,400	3,400	430	320	2,100	3,300	8,300	16,900	6,800	**46,800**	n/a	n/a
2003	5,200	4,000	470	330	2,400	3,600	8,600	19,800	6,200	**50,500**	n/a	n/a
2004	5,600	4,100	490	380	2,700	3,700	9,100	22,600	7,100	**55,800**	n/a	n/a
2005	6,500	4,700	480	420	2,900	3,300	9,800	24,700	8,000	**60,800**	n/a	11,600
% of UK GVA												
1997	0.6%	0.5%	0.04%	0.05%	0.3%	0.5%	1.1%	1.7%	0.6%	**5.5%**	n/a	n/a
1998	0.6%	0.5%	0.04%	0.05%	0.3%	0.5%	1.2%	2.2%	0.6%	**6.1%**	n/a	n/a
1999	0.9%	0.5%	0.05%	0.05%	0.3%	0.5%	1.3%	2.2%	0.7%	**6.5%**	n/a	n/a
2000	0.9%	0.5%	0.05%	0.05%	0.3%	0.5%	1.3%	2.3%	0.9%	**6.8%**	n/a	n/a
2001	0.8%	0.5%	0.06%	0.05%	0.3%	0.5%	1.3%	2.4%	1.0%	**6.8%**	n/a	n/a
2002	0.8%	0.5%	0.06%	0.05%	0.3%	0.5%	1.2%	2.4%	1.0%	**6.7%**	n/a	n/a
2003	0.7%	0.5%	0.06%	0.05%	0.3%	0.5%	1.2%	2.7%	0.9%	**6.9%**	n/a	n/a
2004	0.7%	0.5%	0.06%	0.05%	0.3%	0.5%	1.2%	2.9%	0.9%	**7.1%**	n/a	n/a
2005	0.8%	0.6%	0.06%	0.05%	0.4%	0.4%	1.2%	3.0%	1.0%	**7.3%**	n/a	n/a

Source: Annual Business Inquiry, Office for National Statistics, with the following exceptions:
Crafts - Creative Industries Mapping Document (1998) - turnover, see Annex B
Design - The Business of Design, Design Council - turnover for financial year, see Annex B

[1] Total excludes Crafts and Design as GVA figures are not available for these sectors
[2] Figures for crafts and design are for turnover, which is not directly comparable to GVA. See Annex B for more information. Design estimates may also include activity also included in other Creative Industry sectors, notably Architecture.

Table 1b - Growth in GVA of the Creative Industries, UK [1]

	Advertising	Architecture	Art & Antiques	Designer Fashion	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL** (excl. Crafts and Design) [2]
1997-1998	0%	3%	0%	-7%	-9%	4%	9%	31%	3%	**12%**
1998-1999	52%	-4%	17%	7%	13%	4%	7%	3%	21%	**10%**
1999-2000	9%	8%	8%	18%	3%	3%	3%	5%	27%	**8%**
2000-2001	-11%	3%	10%	-13%	-19%	-7%	3%	8%	10%	**2%**
2001-2002	-6%	-9%	6%	-2%	12%	4%	-9%	0%	-1%	**-2%**
2002-2003	-6%	13%	7%	1%	11%	4%	0%	14%	-11%	**5%**
2003-2004	5%	1%	1%	13%	13%	0%	4%	11%	10%	**8%**
2004-2005	13%	12%	-4%	8%	6%	-12%	4%	7%	11%	**7%**
Average 1997-2005	6%	3%	5%	3%	3%	0%	3%	10%	8%	**6%**

Source: as Table 1a.

[1] Estimates calculated from figures in Table 1a with implied GDP deflator (base = 2000) to remove the effect of inflation. Too much emphasis should not be placed on fluctuations between years (see note on interpretation of the figures)

[2] Total excludes Crafts and Design as annual GVA figures are not available for these sectors

Table 2 - Exports of services for the Creative Industries, UK [1]

£ million

	Advertising	Architecture	Art & Antiques	Design	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL [2]**	Crafts	Designer Fashion
1997	680	380	n/a	n/a	710	250	680	1,400	500	**n/a**	n/a	n/a
1998	630	470	n/a	n/a	680	250	830	1,700	640	**n/a**	40	350
1999	560	410	1,400	n/a	730	270	860	2,300	730	**n/a**	n/a	n/a
2000	710	420	2,000	1,000	940	300	950	2,500	690	**9,500**	n/a	n/a
2001	730	520	1,900	1,000	910	290	830	3,900	910	**11,000**	n/a	390
2002	890	510	2,300	1,200	840	280	790	3,500	1,000	**11,300**	n/a	n/a
2003	1,100	580	2,200	630	810	240	1,200	3,900	1,000	**11,600**	n/a	n/a
2004	1,100	570	2,200	550	940	150	1,500	4,700	1,300	**13,000**	n/a	n/a
2005	1,300	650	2,700	700	1,200	180	1,600	4,800	1,300	**14,600**	n/a	n/a

Source: International Trade in Services, Office for National Statistics, with the following exceptions:

Art & Antiques - Antiques Trade Gazette analysis of HM Revenue and Customs data (UK exports to non-EU countries)

Crafts - Creative Industries Mapping Document (1998)

Design - Design Industry Valuation Survey, British Design Innovation – figures are for financial years

Designer Fashion - Design Fashion Report 1998, A study of the UK designer fashion sector, 2003 - both for BERR (then DTI)

[1] The main data source used is the International Trade in Services and does not include trade in goods.

[2] Total excludes Crafts and Designer Fashion as figures are not available for every year.

Table 3 - Creative employment, Great Britain [1]

Summer quarter [2]	Advertising	Architecture	Art & Antiques	Crafts	Design and Designer Fashion	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL**
Employment in the Creative Industries											
2006	89,900	82,200	21,700	-	3,800 [3]	49,100	206,800	195,200	365,900	94,300	**1,108,900**
Employment in creative occupations in businesses outside the Creative Industries											
2006	140,400	29,000	-	99,300	114,900	8,400	50,400	74,500	265,400	15,100	**797,400**
Total Creative Employment											
1997	201,000	95,800	20,200	95,000	80,700	64,200	226,300	308,500	379,400	97,600	**1,568,700**
1998	204,200	101,500	19,800	119,800	88,800	64,100	217,800	317,100	426,000	101,500	**1,660,700**
1999	200,900	101,500	20,800	96,800	93,500	61,900	255,700	317,000	488,600	92,500	**1,729,300**
2000	206,000	102,600	20,900	111,300	98,500	67,500	224,300	283,900	544,600	109,800	**1,769,400**
2001	220,500	103,400	20,900	115,100	103,000	75,500	224,600	293,300	567,700	104,100	**1,828,100**
2002	215,400	102,900	21,400	114,100	115,000	68,900	240,800	286,800	556,700	108,800	**1,830,700**
2003	213,800	103,100	22,500	108,700	113,200	74,300	245,800	305,200	581,200	110,900	**1,878,800**
2004	200,000	102,600	22,500	112,900	110,400	65,500	232,300	274,300	593,900	110,600	**1,825,000**
2005	223,400	108,200	22,900	95,500	115,500	63,800	236,300	253,300	596,800	108,700	**1,824,400**
2006	230,300	111,300	21,700	99,300	118,700	57,500	257,200	269,700	631,300	109,400	**1,906,300**
Annual growth											
1997-2006	*2%*	*2%*	*1%*	*0%*	*4%*	*-1%*	*1%*	*-1%*	*6%*	*1%*	***2%***
2005-2006	*3%*	*3%*	*-5%*	*4%*	*3%*	*-10%*	*9%*	*6%*	*6%*	*1%*	***4%***

Source: Labour Force Survey, Office for National Statistics - employees and self-employed, main and second job.

[1] The coverage of these data is broader than that of the other bulletin tables since it is possible to count not only jobs in the Creative Industries, but also jobs in creative occupations in business which are classed as being outside these industries, e.g. graphic designers working in a manufacturing firm.

[2] From 2006 the summer quarter covers July to September. Previously it covered June to August.

[3] As no SIC codes match the design sector, this estimate is for designer fashion only, see Annex A Table A1.

Table 4 - Numbers of businesses in the Creative Industries, UK [1]

	Advertising	Architecture	Art & Antiques	Designer Fashion	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL**
1997	10,400	3,400	1,500	1,400	4,800	32,600	7,000	49,500	2,300	**112,900**
1998	10,300	3,300	1,600	1,300	5,500	32,500	6,800	52,600	2,300	**116,200**
1999	10,000	3,400	1,700	1,300	6,000	32,200	6,800	55,700	2,700	**119,800**
2000	10,000	3,300	1,800	1,300	6,500	32,500	6,700	56,700	3,000	**121,800**
2001	10,100	3,100	1,800	1,300	6,800	32,600	6,700	56,100	3,400	**121,900**
2002	10,100	3,000	1,800	1,300	7,400	32,300	6,700	55,800	3,600	**122,000**
2003	10,100	3,500	1,800	1,300	7,900	31,500	6,700	53,700	4,000	**120,500**
2004	9,800	4,100	1,700	1,400	8,000	30,100	6,500	49,100	4,200	**114,900**
2005	9,900	4,700	1,700	1,400	8,600	29,000	6,700	51,200	4,400	**117,500**
2006	10,100	5,300	1,700	1,500	8,900	28,300	6,700	53,500	4,700	**120,700**

Source: Inter-Departmental Business Register (IDBR), Office for National Statistics.

[1] As measured by the IDBR (see Annex C). Crafts and Design are therefore excluded as there are no corresponding SIC codes (see Annex A, Table A1).

ANNEX A – Mapping the Creative Industries to official data classifications

Table A1 - Assumption for correspondence between Creative Industries and the 2003 Standard Industrial Classification

Mapping Document Chapter	Sector	Standard Industrial Classification (SIC) Code	Description	Proportion of code taken (*)
1	Advertising	74.40	Advertising	
2	Architecture	74.20	Architecture and engineering activities and related technical consultancy (‡)	✓
3	Art & Antiques	52.48	Other retail sale in specialised stores (‡)	✓
		52.50	Retail sale of second-hand goods in stores	✓
4	Crafts	Majority of businesses too small to be picked up in business surveys		
5	Design	No codes match this sector		
6	Designer Fashion	9 Codes	Clothing Manufacture (†)	✓
		74.87	Other business activities not elsewhere classified	✓
7	Video, Film & Photography	22.32	Reproduction of video recording	✓
		74.81	Photographic activities	✓
		92.11	Motion picture and video production	
		92.12	Motion picture and video distribution	
		92.13	Motion picture projection	
9 & 10	Music and the Visual & Performing Arts	22.14	Publishing of sound recordings	
		22.31	Reproduction of sound recording	✓
		92.31	Artistic and literary creation and interpretation	
		92.32	Operation of arts facilities	
		92.34	Other entertainment activities not elsewhere classified	✓
		92.72	Other recreational activities not elsewhere classified	✓
11	Publishing	22.11	Publishing of books	
		22.12	Publishing of newspapers	
		22.13	Publishing of journals and periodicals	
		22.15	Other publishing	✓
		92.40	News agency activities	

Table A1 (continued): Assumption for correspondence between Creative Industries and 2003 Standard Industrial Classification

Mapping Document Chapter	Sector	Standard Industrial Classification (SIC)		Proportion of code taken (*)
		SIC	Description	
8 & 12	Software, Computer Games & Electronic Publishing	22.33	Reproduction of computer media	✓
		72.21	Publishing of software	
		72.22	Other software consultancy and supply	
13	Radio & TV	92.20	Radio and television activities	

* As some SICs contain activity deemed to be outside of the Creative Industries, only a proportion of the total activity within these codes is included in the estimates (see Annex B).

† 9 Clothing Manufacturing codes used for Designer Fashion:
17.71, 17.72, 18.10, 18.21, 18.22, 18.23, 18.24, 18.30, 19.30

‡ For Table 4 (Numbers of Businesses), it is possible to use more specific '5 digit' codes for these 2 classes. These are 74.20/1 (Architectural activities) and 52.48/9 (Other retail sale in specialised stores not elsewhere classified).

Table A2 - Best-fitting SOC2000 codes for Creative Occupations (*to estimate number of creative jobs outside businesses in the Creative Industries*)

Mapping Document Chapter	Sector	Standard Occupational Classification (SOC)	
		SOC	Description
1	Advertising	1134	Advertising and Public Relations managers
		3433	Public Relations officers
		3543	Marketing associate professionals
2	Architecture	2431	Architects
		2432	Town Planners
		3121	Architectural technologists and Town Planning technicians
3	Art & Antiques	No codes match this sector	
4	Crafts	5491	Glass and Ceramics makers, decorators and finishers
		5492	Furniture makers, other craft woodworkers
		5493	Pattern makers (moulds)
		5494	Musical Instrument makers and tuners
		5495	Goldsmiths, Silversmiths, Precious Stone workers
		5496	Floral arrangers, Florists
		5499	Hand Craft occupations not elsewhere classified
		8112	Glass and Ceramics process operatives
		9121	Labourers in Building and Woodworking Trades (Δ)
5 & 6	Design & Designer Fashion	2126	Design and Development engineers
		3411	Artists
		3421	Graphic Designers
		3422	Product, Clothing and related designers
		5411	Weavers and Knitters
7	Video, Film & Photography	3434	Photographers and Audio-Visual equipment operators
9 & 10	Music and the Visual & Performing Arts	3412	Authors, Writers
		3413	Actors, Entertainers
		3414	Dancers and Choreographers
		3415	Musicians
		3416	Arts officers, producers and directors
11	Publishing	3431	Journalists, Newspaper and Periodical editors
		5421	Originators, Compositors and Print preparers
		5422	Printers
		5423	Bookbinders and Print finishers
		5424	Screen printers

Table A2 (continued) - Best-fitting SOC2000 codes for Creative Occupations (*to estimate number of creative jobs outside businesses in the Creative Industries*)

Mapping Document Chapter	Sector	Standard Occupational Classification (SOC)	
		SOC	Description
8 & 12	Software, Computer Games & Electronic Publishing	1136	Information and Communication Technology managers
		2131	IT Strategy and Planning professionals
13	Radio & TV	3432	Broadcasting associate professionals
		5244	TV, Video and Audio engineers

Δ Only a proportion of this SOC is taken

ANNEX B – Further Notes

1. Classifications

As shown in Annex A, the definitions for the Creative Industries are based on the UK Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC). However, the structure of these classifications means that for some SICs, identification of Creative Industries within *wider* industrial codes is required in order to produce the estimates in this bulletin. This is done by taking a proportion of the wider code – to represent only the part within the 'Creative Industries'. This methodology is currently being reviewed as part of the evidence review consultation discussed earlier in the Future Work section of this bulletin.

Minor revisions were made to the SIC in 2003. The implications of the change from SIC(98) to SIC(03) for this bulletin are minimal with only the definitions for the Designer Fashion and Software sectors being affected. Data from 2003 onwards for these sectors are therefore not entirely consistent with previous years.

A full revision of the SIC structure has recently been undertaken (SIC2007) and will be implemented for data collection from 2008, to be published in 2009. These changes will have major implications for the future series and will be dealt with in the wider bulletin methodological review.

2. Revisions

The following revisions have been incorporated to the bulletin since the last publication in September 2006:

- ONS have revised source GVA data from the ABI for 2004 for a number of SICs, so Tables 1a and 1b have been updated accordingly.
- All comparative series for the whole economy have been updated to reflect the latest national estimates.
- Table 2 has been renamed "Exports of services" rather than just "Exports" as the main data source used for most sectors is the International Trade in Services (ITIS), which does not include trade in goods.
- The "Summer quarter" used for employment figures in Table 3 now covers July to September. For 2005 and all previous years it had covered June to August. This change reflects an adjustment in the way source data is published by ONS.
- The data source for Design in Tables 1a and 1b has changed from BDI's "Design Industry Valuation" to the Design Council's "The Business of Design". In addition, the backdated BDI data has been removed and a new series started with the Design Council data. The reasons for this change are discussed in the NOTES section earlier in this bulletin.
- The total Creative Industries GVA and total percentage of UK GVA no longer include an estimate of Design industry turnover. This change has been backdated so that all previous totals no longer include Design. The reasons for this change are discussed in the NOTES section earlier in this bulletin.

As a result of the last two revisions regarding the source and use of Design industry data there have been some significant changes to the backdated series of total GVA and contribution to UK GVA in Table 1a. Removing Design has made the GVA total (and therefore percentage contribution to UK GVA) smaller for each year from 2000 to 2004. However, this does not mean that the Creative Industries were smaller than originally estimated but instead reflects the exclusion of Design to correct a methodological inconsistency.

In previous bulletins the series for total GVA and % contribution to UK GVA started in 2000 as there was no Design data before that point. Removing Design from the total removes that restriction so that now the figures can be shown back to 1997, enabling us to view the aggregate trends over a longer period of time. This also brings Table 1a into line with Table 1b, which has always excluded Design from the total growth figures because data is not available for every year.

Please contact DCMS for further detail on any of these revisions.

3. Comparison to Input Output analyses figures for GVA (tables 1a & 1b)

The Creative Industries Economic Estimates differ significantly from those produced alongside National Statistics Input-Output analysis which is based on products rather than industries.

The most significant difference occurs from the input-output analysis not taking account of the fact that large proportions of data produced under the standard classification systems are not the result of creative activity. This causes some overestimation, for example since 'Clothing' is used in place of 'Designer Fashion'.

Finally, the input-output analyses exclude those sectors for which there is no official data, for example for Crafts and Design. This bulletin uses the best available data for these, which are industry estimates (though Crafts and Design are similarly excluded from total GVA estimates).

4. Turnover data (tables 1a & 1b)

As the Crafts and Design sectors cannot be identified using official classifications, it is not possible to use the Annual Business Inquiry to obtain GVA data. Alternative sources are therefore used, but these measure turnover which differs from GVA for the following reasons:

(i) A turnover figure will always be greater than a corresponding GVA figure[5]. GVA can vary between 30% and 80% of turnover depending on the industry.
(ii) There may be some overlap in these estimates with data for other Creative Industries – particularly between Design and Architecture.

[5] This is because GVA measures the difference between the value of goods and services produced and the cost of raw materials and other inputs used up in production. Turnover measures just the value of sales of goods and services.

ANNEX C – Sources and References

1. DCMS, *Creative Industries Mapping Document 1998* (1998).
   http://www.culture.gov.uk/Reference_library/Publications/archive_1998/Creative_Industries_Mapping_Document_1998.htm

2. DCMS, *Creative Industries Mapping Document 2001* (2001).
   http://www.culture.gov.uk/Reference_library/Publications/archive_2001/ci_mapping_doc_2001.htm

3. DCMS Evidence Toolkit
   http://www.culture.gov.uk/Reference_library/Research/det/

4. Creative Economy Programme
   http://www.cep.culture.gov.uk/index.cfm?fuseaction=main.viewSection&intSectionID=334

   Creative Economy Programme Evidence Publication 2007
   http://www.cep.culture.gov.uk/cepevidence2007

   Evidence & Analysis Group – Draft Report
   http://www.cep.culture.gov.uk/index.cfm?fuseaction=main.viewBlogEntry&intMTEntryID=2991

5. **ONS, Annual Business Inquiry (ABI)**
   The ABI estimates cover all UK businesses registered for VAT and/or PAYE, classified to the 1992 or 2003 Standard Industrial Classification. The ABI contains details on these businesses from the ONS Inter-Departmental Business Register (IDBR). For more information on the ABI see ONS website - ABI

6. **ONS, Inter-Departmental Business Register (IDBR)**
   The IDBR is the comprehensive list of UK businesses that is used by government for statistical purposes. The IDBR covers businesses in all parts of the economy, other than some very small businesses (self-employed and those without employees and low turnover) and some non-profit making organisations. This therefore affects some Creative Industry sectors, such as Crafts, more than others due to a predominance of small businesses. For more information on the IDBR see ONS website - IDBR

7. **ONS, Labour Force Survey (LFS)**
   The LFS is a quarterly sample survey of households living at private addresses in Great Britain. Its purpose is to provide information on the UK labour market that can then be used to develop, manage, evaluate and report on labour market policies. For more information on the LFS see ONS website - LFS

8. **ONS, International Trade in Services**
   The ONS conducts an inquiry into international transactions of companies offering business services. For more information see ONS website - International Trade. The figures used in this bulletin are specially commissioned from ONS by DCMS.

9. **The Business of Design, Design Council**
   This is a survey carried out in 2004-05 by the Design Council providing data on many aspects of the Design industry. The Design Council aim to repeat the survey every three years.
   http://www.design-council.org.uk/en/Design-Council/3/Publications/The-Business-of-Design/

10. **Design Industry Valuation Survey, British Design Initiative**
    This is an annual survey undertaken by the British Design Innovation based on over 4,000 BDI registered design agencies. For more information see BDI website

11. **Antiques Trade Gazette**
    The figure for exports used in this bulletin was produced by the Gazette from analysis of HM Revenue and Customs data and covers only UK exports to non-EU countries.
    http://www.antiquestradegazette.com/