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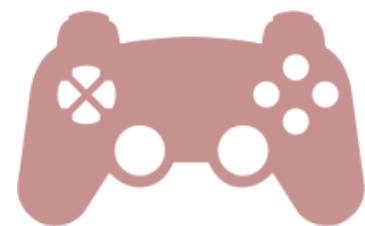
The Creative Industries Economic Estimates

An Overview

Dr Niall Goulding

Overview

- The Government's official statistics on the economic impact of the Creative Industries.
- Gross value added
- Occupations
- Exports of services



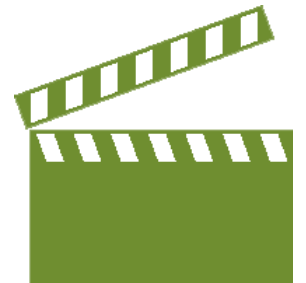
First some definitions...

- Gross value added (GVA) is a measure of production
- $GVA + \text{taxes on products} - \text{subsidies on products} = \text{GDP}$
- Occupations are first and second jobs, either full or part time, including self employed



First some definitions...

- Exported services include time, expertise, the use of equipment, or some other non physical thing.



First some definitions...

- **Creative Industries:**
 - **Advertising and marketing**
 - **Architecture**
 - **Crafts**
 - **Design: product, graphic and fashion design**
 - **Film, TV, video, radio and photography**
 - **IT, software and computer services**
 - **Publishing**
 - **Museums, galleries and libraries**
 - **Music, performing and visual arts**



First some definitions...

- Creative Industries:

Film, TV, video, radio and photography

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



First some definitions...

- **Creative Occupations:**
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First some definitions...

- Creative Occupations:
 - **Advertising and marketing**

1132 Marketing and sales directors

1134 Advertising and public relations directors

2472 Public relations professionals

2473 Advertising accounts managers and creative directors

3543 Marketing associate professionals



And finally...

- The Creative Industries is everyone employed in the Creative Industries regardless of the occupation
- The Creative Economy is the Creative Industries, plus everyone outside them in Creative Occupations



Background

- Earliest attempts by DCMS to define and measure the Creative Industries were in 1998 and 2001 with the “Mapping Documents”
- Further work done with ONS and Nesta to improve the definitions



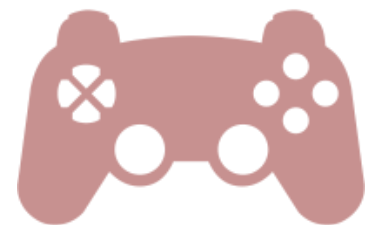
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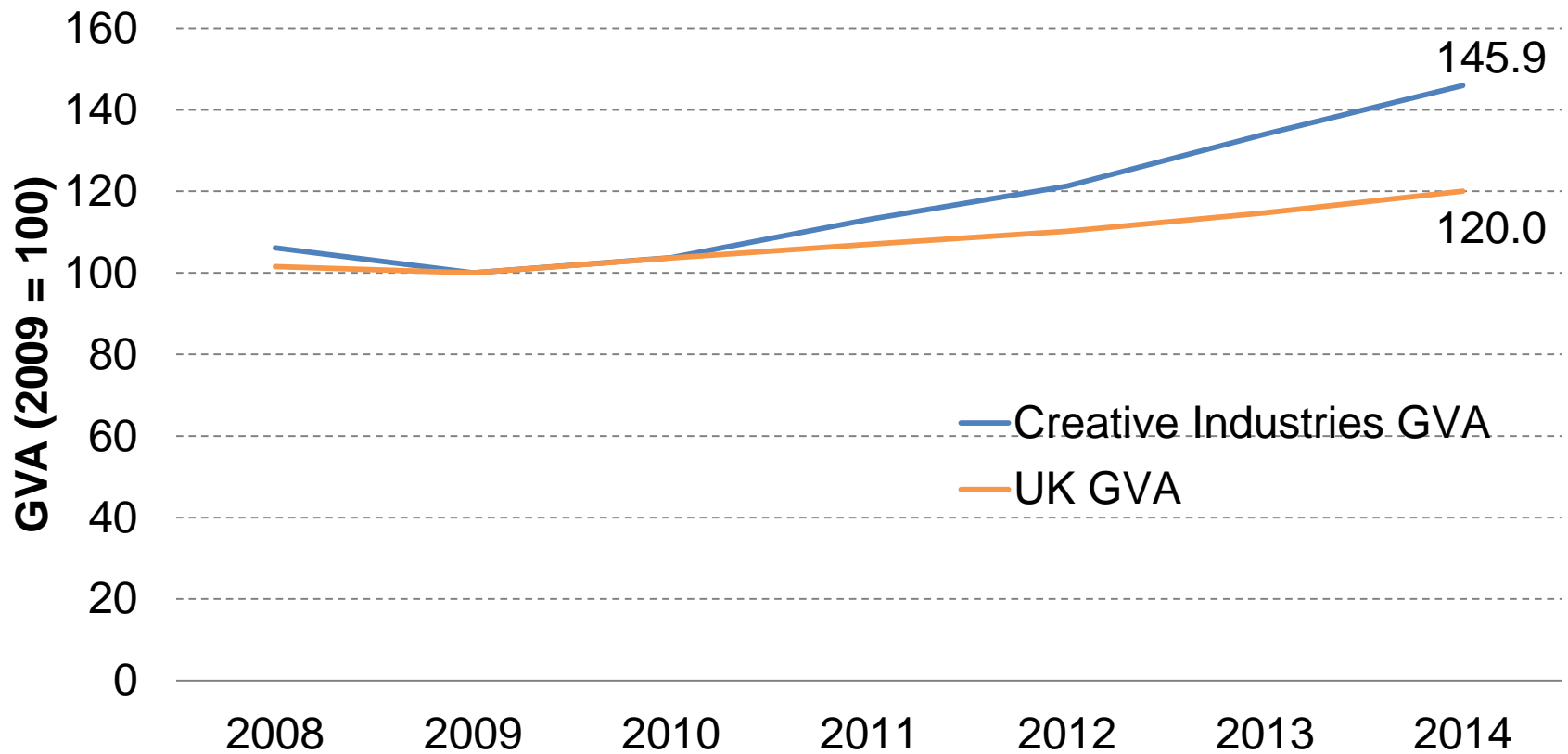
- Current approach uses the “Creative Intensities”
- This means an industry composed of a sufficient number of Creative Occupations

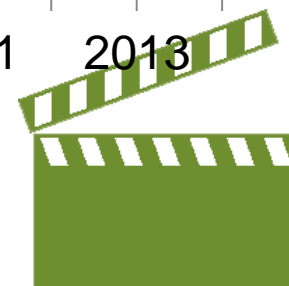
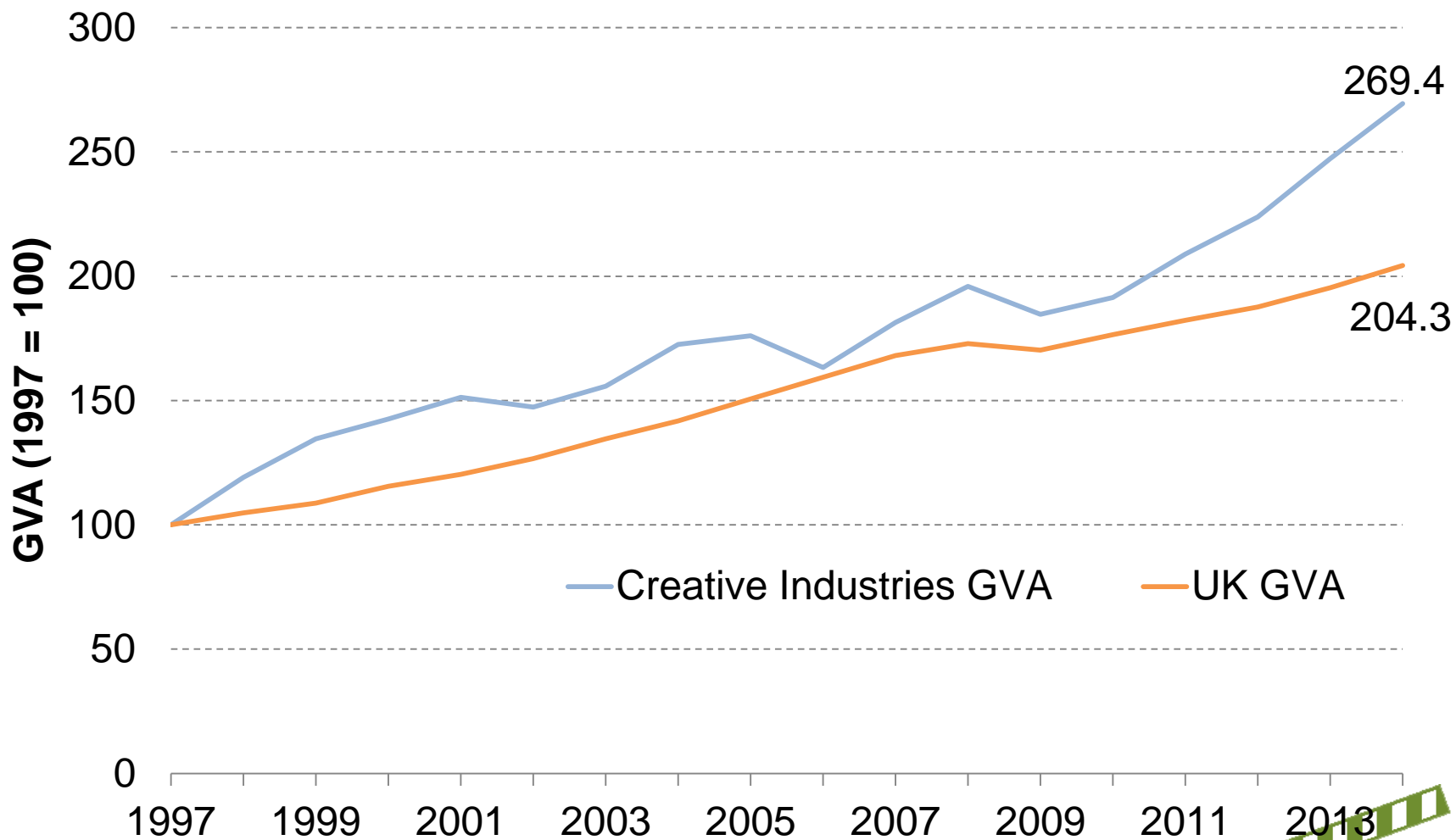


So where are we today?

- DCMS released the latest stats on the 26th January 2016
- Latest figures are from 2014
- The Creative Industries were worth £84.1 billion – 5.2% of the UK economy
- That's an 8.9% increase from 2013





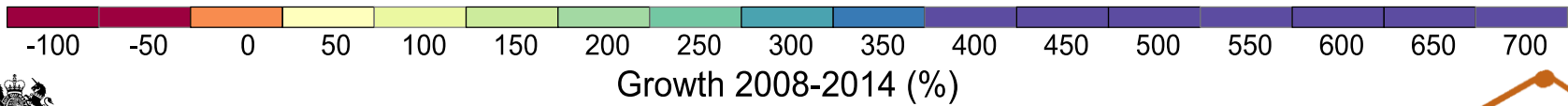
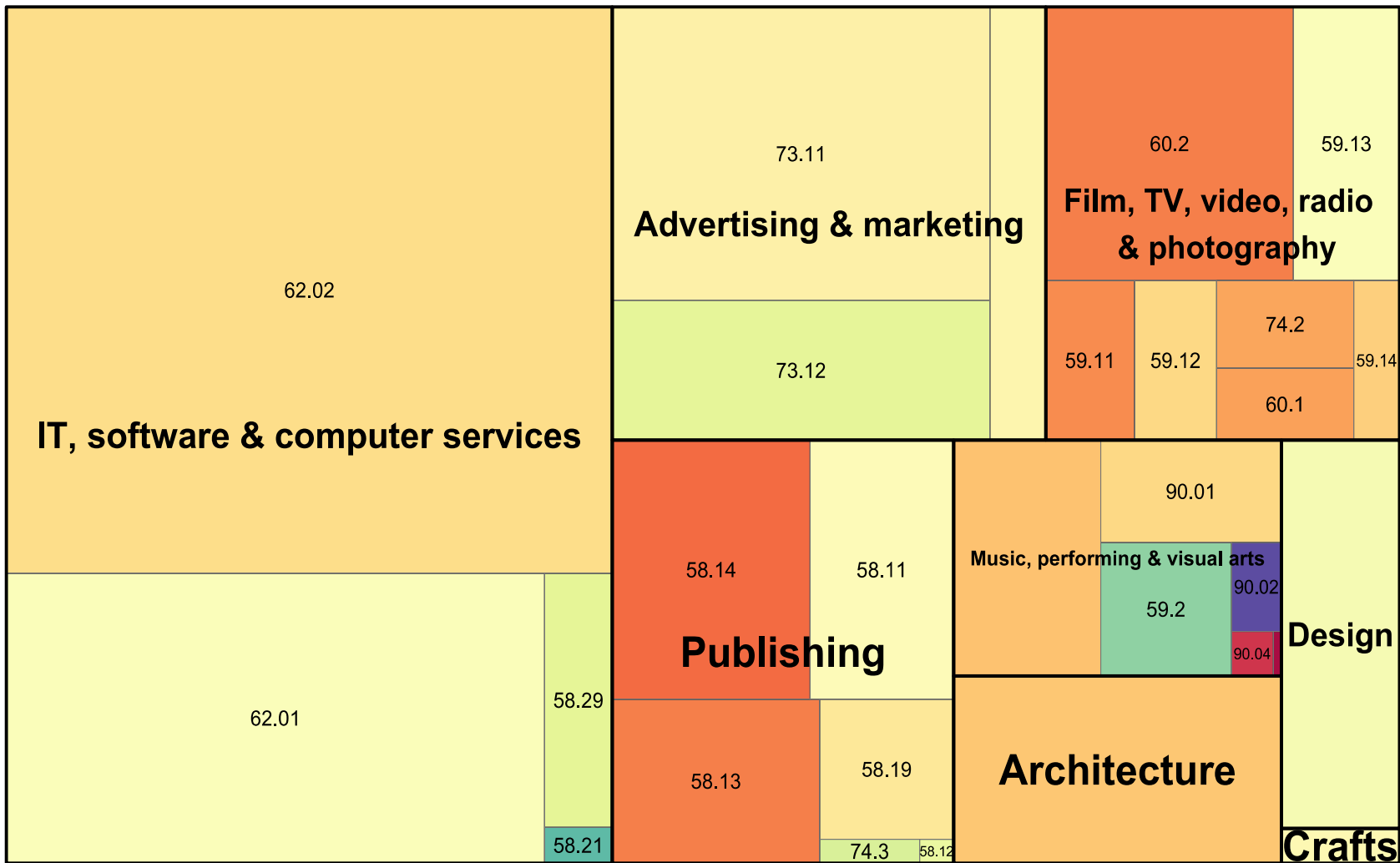


Sector	% change (2013-2014)	CAGR (2008-2014)
1. Advertising and marketing	10.9%	8.0%
2. Architecture	16.4%	3.3%
3. Crafts	-	-
4. Design: Product, Graphic and Fashion Design	16.6%	9.7%
5. Film, TV, video, radio and photography	13.8%	4.7%
6. IT, software and computer services	7.4%	5.8%
7. Publishing	2.8%	1.6%
8. Museums, Galleries and Libraries	-	-
9. Music, performing and visual arts	5.4%	6.5%
Total	8.9%	5.4%
UK Total (Blue book, ABML)	4.6%	2.8%
% share of UK Total	2.7%	2.5%



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Blue Book Sector or Creative Industries	Percentage Change in GVA between 2013 & 2014	Percentage Change in GVA between 2008 & 2014
Construction	10.2%	9.7%
Creative Industries	8.9%	37.5%
Total professional and support	7.3%	22.6%
Other services	7.1%	30.6%
Financial and Insurance Activities	7.0%	21.6%
Distribution, transport, hotels and restaurants	5.5%	16.3%
Real Estate Activities	3.7%	34.7%
Agriculture, Forestry and Fishing	2.5%	11.9%
Information and Communication	2.2%	13.3%
Government, health and education	2.2%	12.7%
Production	-0.2%	11.7%
UK Economy Total	4.6%	18.2%



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Latest occupation stats

- Employment in the Creative Economy increased by 5% between 2013 and 2014 to 2.8 million jobs
- The number of jobs in the Creative Industries increased by 5.5% between 2013 and 2014 to 1.8 million
- In 2014 there were 1.9 million jobs in Creative Occupations, a 6.4% increase since 2013
- Compare to 2.1% increase in the total number of jobs in the wider UK economy between 2013 and 2014



Latest exports stats

- The value of services exported by the UK Creative Industries in 2013 was £17.9bn
- Exports of Services by the UK Creative Industries increased by 3.5 per cent between 2012 and 2013
- Exports of services from the Creative Industries accounted for 8.7 per cent of total exports of services for the UK in 2013



So where to next?

- We've proposed a number of developments in the latest publication
- We'd like your feedback on these
- For some, we've already done the analysis...



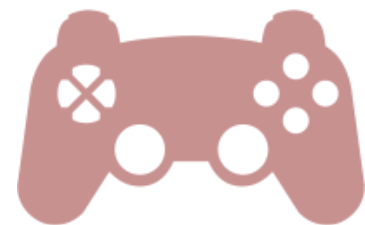
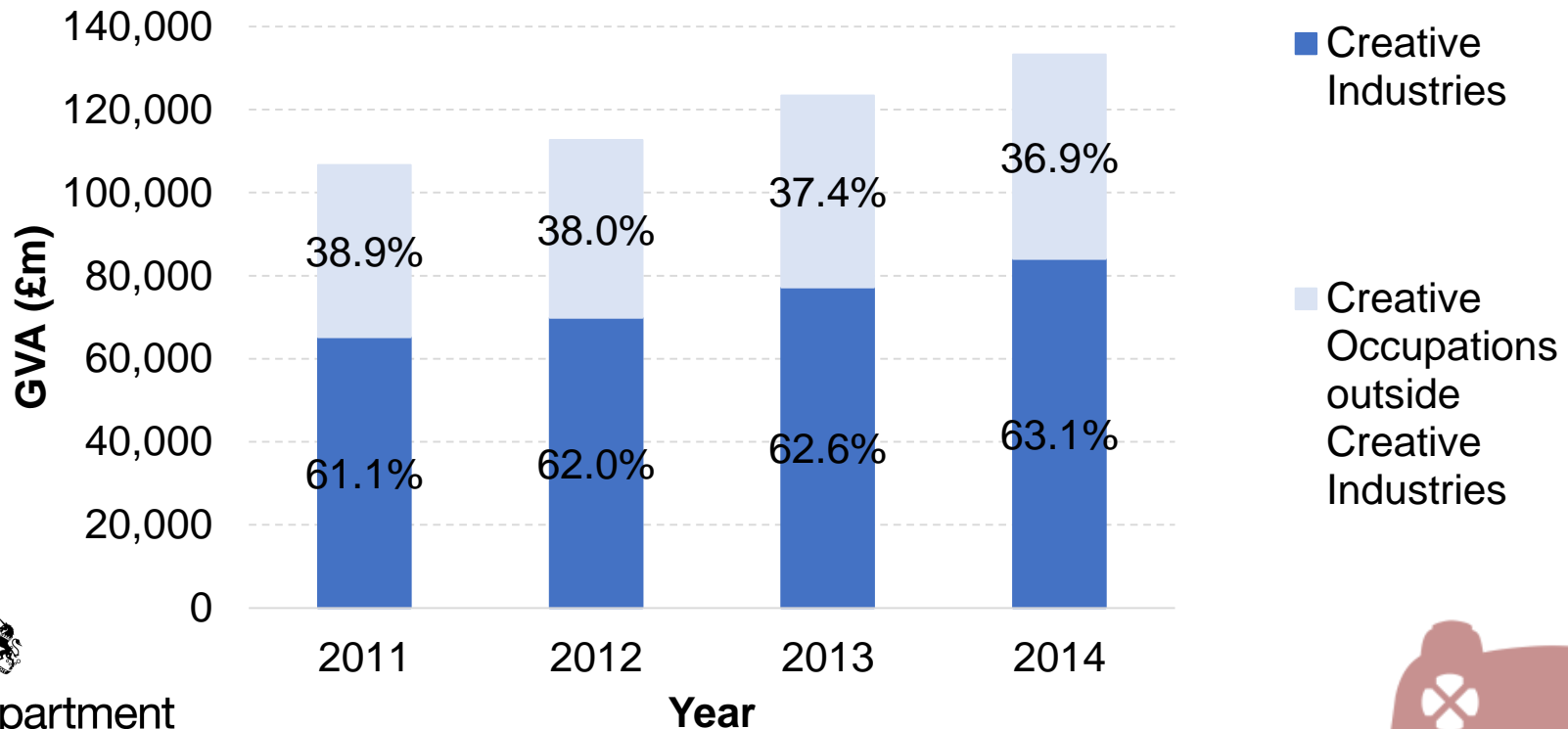
Proposed developments

- Estimates of GVA for the Creative Economy.
- Accounting for under coverage of microbusinesses and self-employed.
- Estimates of Productivity for the Creative Industries.
- Inclusion of exports of goods in estimates of exports.
- Reviewing the industries included using the creative intensity approach.
- Sub-national GVA estimates
- Now-casting



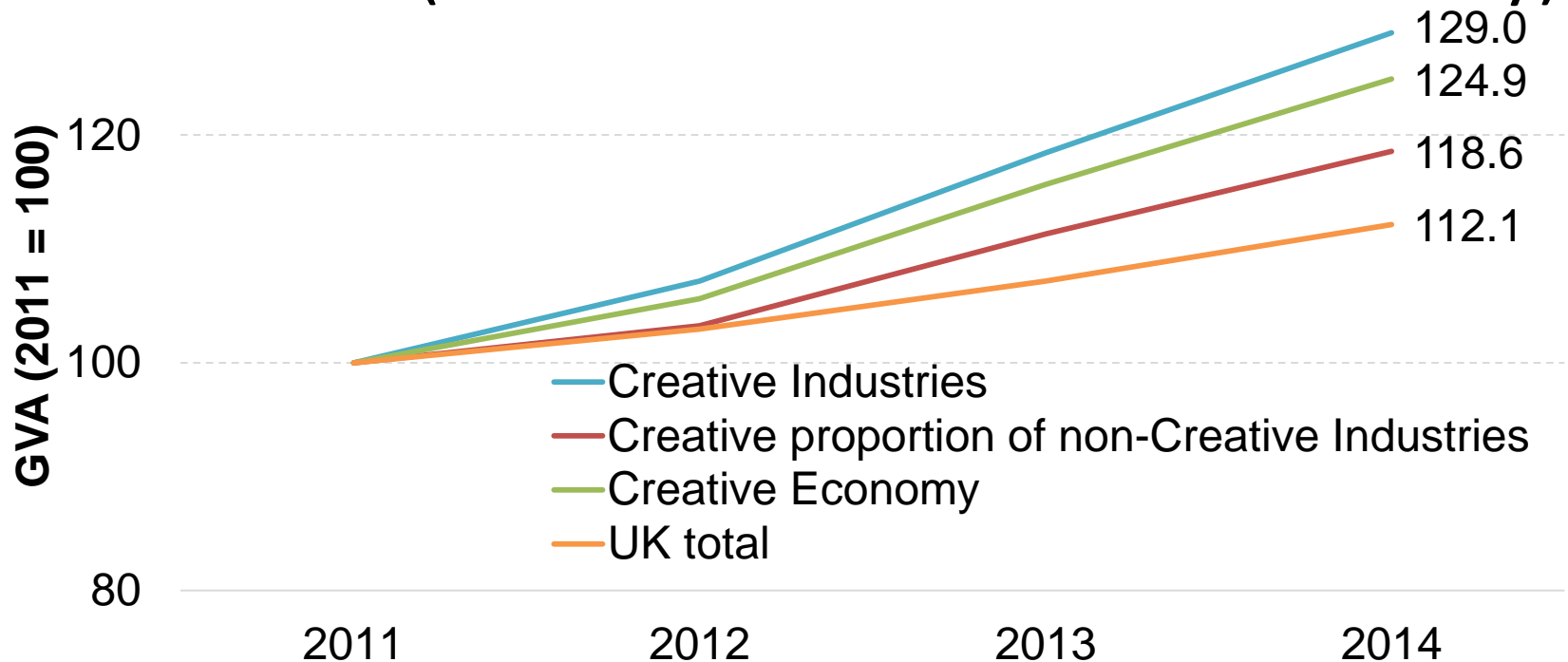
Creative Economy GVA

- In 2014, the Creative Economy was worth £133.3bn (8.2% of the UK economy)



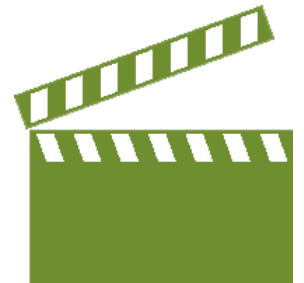
Creative Economy GVA

- The Creative Economy has grown by a quarter since 2011 (12.1% for the whole UK economy)



Export of goods

- We can measure exports of goods using Classification of Product Activity codes
- These codes classify goods, not industries
- The categories are reasonably aligned with the SIC codes



Export of goods

Category	CPA (08)		2013	2014
Architectural Plans & Drawing	P2YH	Group 71.1	11	91
Jewellery, Bijouterie & Related Articles	P2XP	Group 32.1	4 462	4 449
Films & Videos	P2CH	Group 59.1	442	343
Exposed Photographic Film	P2CN	Group 74.2	7	4
Packaged Computer Software	P2CF	Group 58.2	516	395
Printed Matter	P2CE	Group 58.1	1 640	1 655
Antiques & Collections	P2CS	Group 91.0	804	877
Audio Recordings & Printed Music	P2CI	Group 59.2	130	119
Paintings & Sculptures	P2CQ	Group 90.0	2 907	2 682
Musical Instruments	P2XQ	Group 32.2	62	76
Total Creative Industries			10,981	10,691

£million



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