

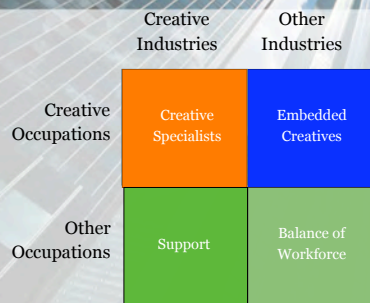
Beyond the Creative Industries: mapping the creative economy in the UK

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Our Objectives:

- To better inform policy makers
- To provide “defensible” evidence of the extent and contribution of Creative Workforce to the economy
- To more reliably “ground” the creative workforce sizing and characteristics studies within the whole economy so that meaningful comparisons can be made
- How to measure reliably the level of Intermediate Outputs from Creative Industries to the rest of the economy?

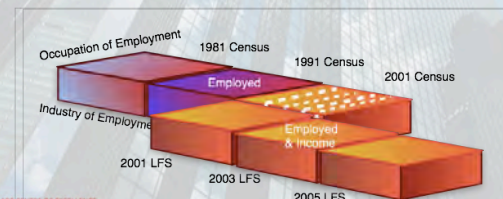
The Creative Trident Approach



- Whole of economy employment datasets: Census is best
- Count of employment for each occupation within every industry
- Creative Employment is three quadrants within the workforce
- Each quadrant or mode is interdependent
- Applies to segments and sub-segments

Approach: Census & LFS Cubes:

- 1981, 1991 and 2001 Census for whole of economy: 121,000 records
- 2001 Trident would be too high due to data for three industries only being available at 2 digits
- 2001 to 2006 LFS matrices detailed industries + income, main job only, employee and self-employed
- Recalibrate 2001 with LFS data and apply mean incomes



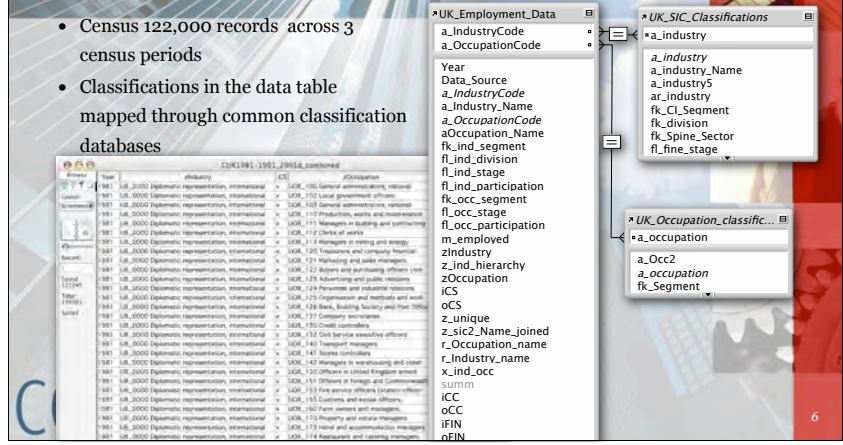
The datasource: count of Employment of each Occupation within each Industry (and with mean income if available)

- Census 122,000 records across 3 census periods

Year	zIndustry	iCS	aOccupation	m_employed
1991	U8_0000 Diplomatic representation, international	X	U08_100 General administrators, national	110
1991	U8_0000 Diplomatic representation, international	X	U08_102 Local government officers	11
1991	U8_0000 Diplomatic representation, international	X	U08_103 General administrators, national	19
1991	U8_0000 Diplomatic representation, international	X	U08_110 Production, works and maintenance	127
1991	U8_0000 Diplomatic representation, international	X	U08_111 Managers in building and contracting	52
1991	U8_0000 Diplomatic representation, international	X	U08_112 Clerks of works	6
1991	U8_0000 Diplomatic representation, international	X	U08_113 Managers in mining and energy	14
1991	U8_0000 Diplomatic representation, international	X	U08_120 Treasurers and company financial	10
1991	U8_0000 Diplomatic representation, international	X	U08_121 Marketing and sales managers	121
1991	U8_0000 Diplomatic representation, international	X	U08_122 Buyers and purchasing officers (ret.	20
1991	U8_0000 Diplomatic representation, international	X	U08_123 Advertising and public relations	16
1991	U8_0000 Diplomatic representation, international	X	U08_124 Personnel and industrial relations	20
1991	U8_0000 Diplomatic representation, international	X	U08_125 Organisation and methods and work	13
1991	U8_0000 Diplomatic representation, international	X	U08_126 Banks, Building Society and Post Office	53
1991	U8_0000 Diplomatic representation, international	X	U08_127 Company secretaries	3
1991	U8_0000 Diplomatic representation, international	X	U08_130 Credit controllers	1
1991	U8_0000 Diplomatic representation, international	X	U08_132 Civil Service executive officers	7
1991	U8_0000 Diplomatic representation, international	X	U08_140 Transport managers	32
1991	U8_0000 Diplomatic representation, international	X	U08_141 Stores controllers	31
1991	U8_0000 Diplomatic representation, international	X	U08_142 Managers in warehousing and other	11
1991	U8_0000 Diplomatic representation, international	X	U08_150 Officers in United Kingdom armed	59
1991	U8_0000 Diplomatic representation, international	X	U08_151 Officers in foreign and Commonwealth	256
1991	U8_0000 Diplomatic representation, international	X	U08_153 Fire service officers (station officer	1
1991	U8_0000 Diplomatic representation, international	X	U08_153 Customs and excise officers,	8
1991	U8_0000 Diplomatic representation, international	X	U08_160 Farm owners and managers,	11

The datasource: count of Employment of each Occupation within each Industry (and with mean income if available)

- Census 122,000 records across 3 census periods
- Classifications in the data base mapped through common classification databases



Verifying all Classification Selections (and rejections)

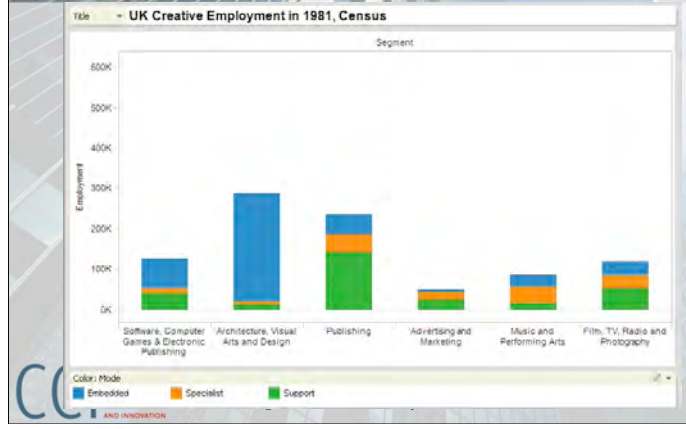
zIndustry	aOccupation	Sum of m_employed	Share
U_924 News agency activities	Total Total of all Occupations within the industry	17,841	100.0%
	UO_3431 Journalists, newspaper and periodical editors	7,704	43.2%
	UO_3434 Photographers and audio-visual equipment operators	546	3.0%
	UO_3432 Authors, writers	487	2.7%
	UO_2132 Software professionals	336	1.9%
	UO_4135 Library assistants/clerks	320	1.8%
	UO_3435 Broadcasting associate professionals	274	1.5%
	UO_3543 Marketing associate professionals	237	1.3%
	UO_3421 Graphic designer	199	1.1%
	UO_3411 Artists	128	0.7%

aOccupation	zIndustry	Share of Total Employed	Occupation
UO_3431 Journalists, newspaper and periodical editors	Total	43.2%	100.0%
	U_221 Publishing	35,427	54.8%
	U_924 News agency activities	7,704	11.7%
	U_922 Radio and television activities	3,621	5.6%
	U_222 Printing and service activities related	1,333	2.1%
	U_7220 Computer Software consultancy	1,274	2.0%
	U_741 Legal, accounting, book keeping and	1,263	2.0%
	U_748 Miscellaneous business activities not	1,247	1.9%
	U_923 Other entertainment activities	1,176	1.8%
	U_91 Activities of membership organisation	781	1.2%

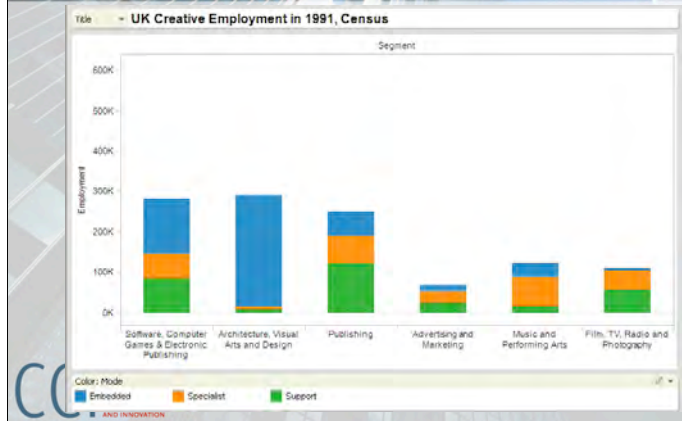
54% of employment is in Creative Occupations

78% of employment is in Creative Industries

Employment for specialist and embedded creative and support staff by segment - 1981

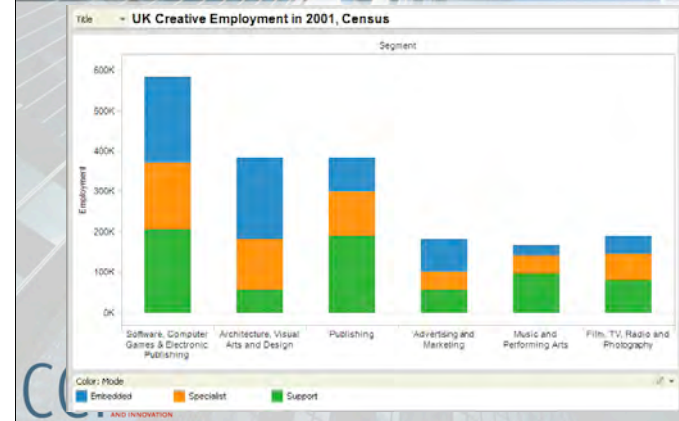


Employment for specialist and embedded creative and support staff by segment - 1991



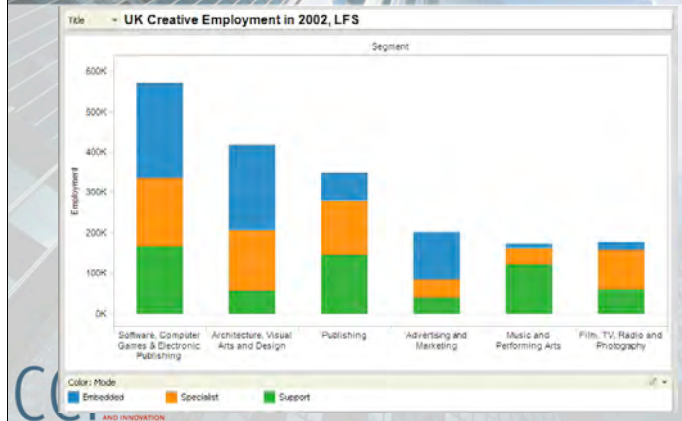
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Employment for specialist and embedded creative and support staff by segment - 2001



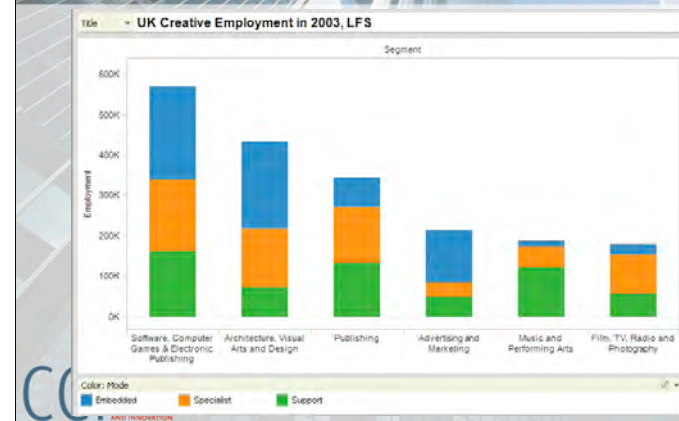
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Employment for specialist and embedded creative and support staff by segment - 2002



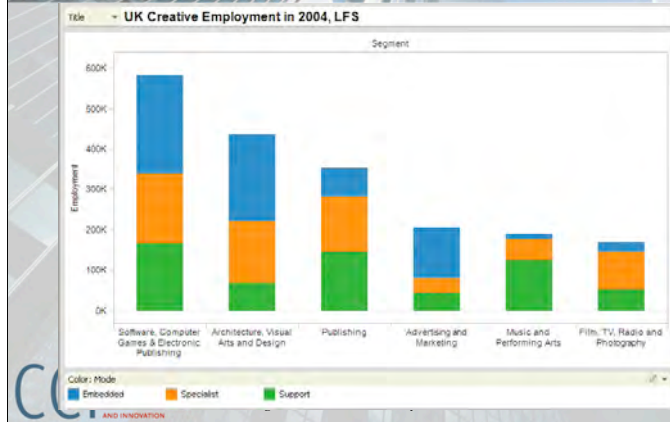
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Employment for specialist and embedded creative and support staff by segment - 2003



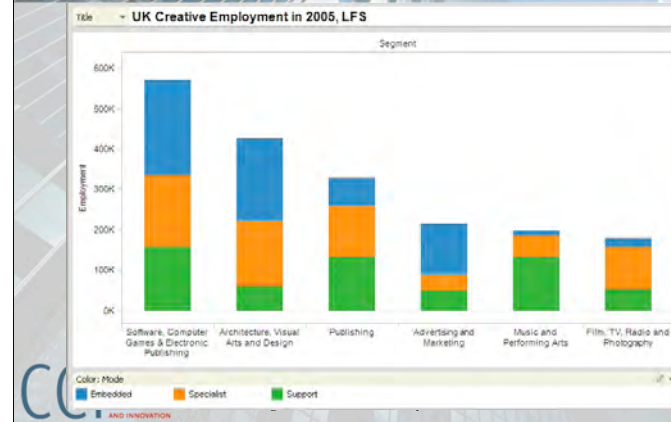
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Employment for specialist and embedded creative and support staff by segment - 2004



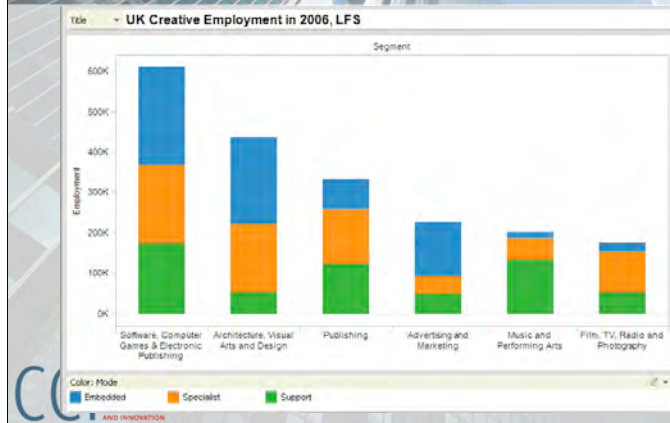
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Employment for specialist and embedded creative and support staff by segment - 2005



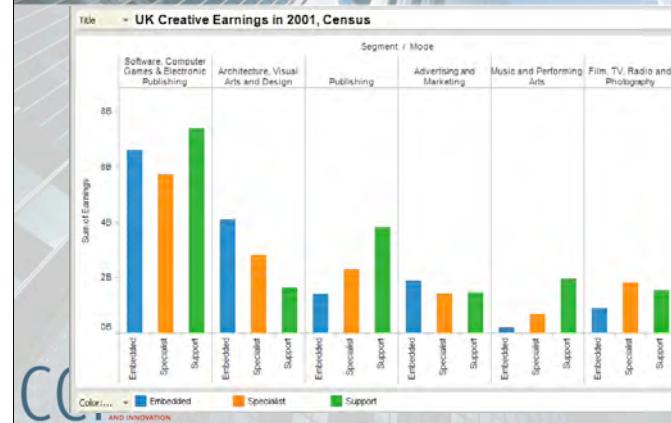
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Employment for specialist and embedded creative and support staff by segment - 2006



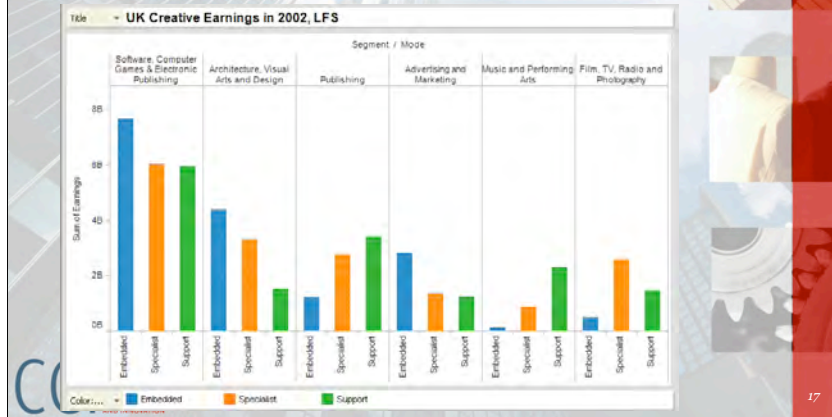
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The total earnings contributed by specialist and embedded creatives and support staff by segment - 2001

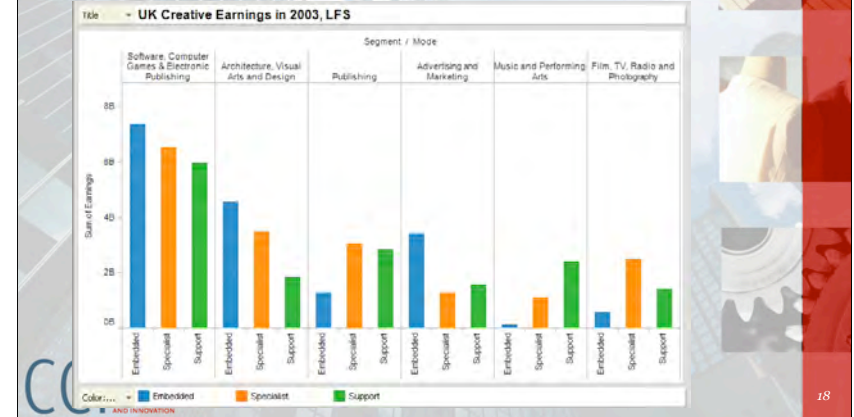


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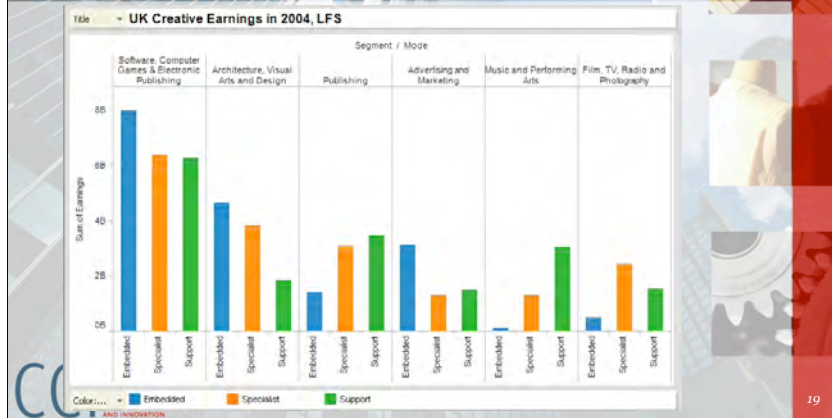
The total earnings contributed by specialist and embedded creatives and support staff by segment - 2002



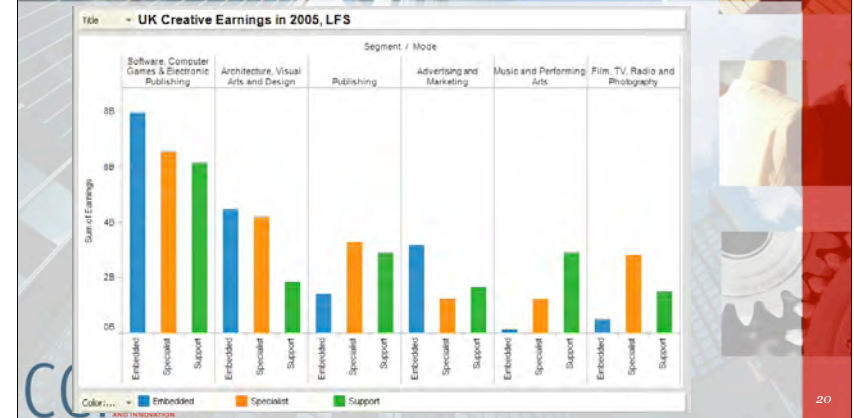
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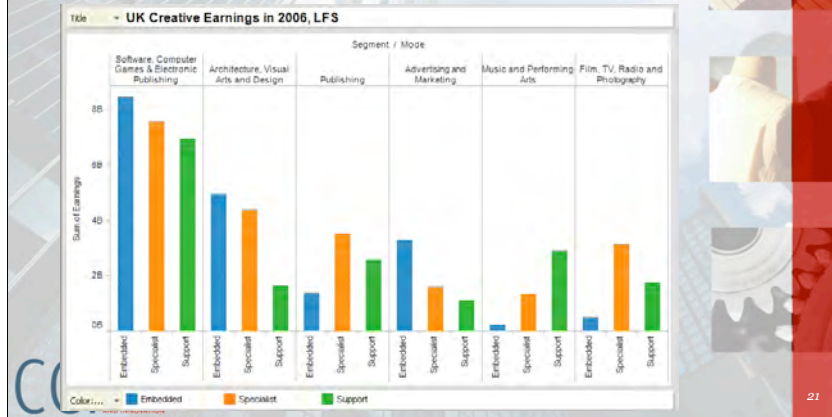
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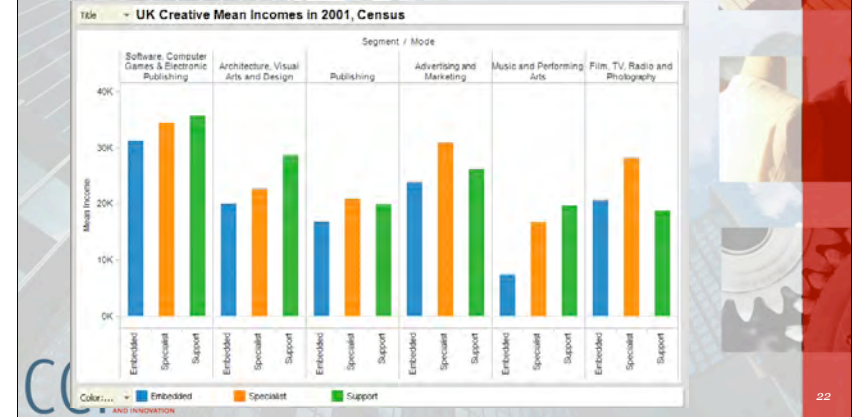
The total earnings contributed by specialist and embedded creatives and support staff by segment - 2005



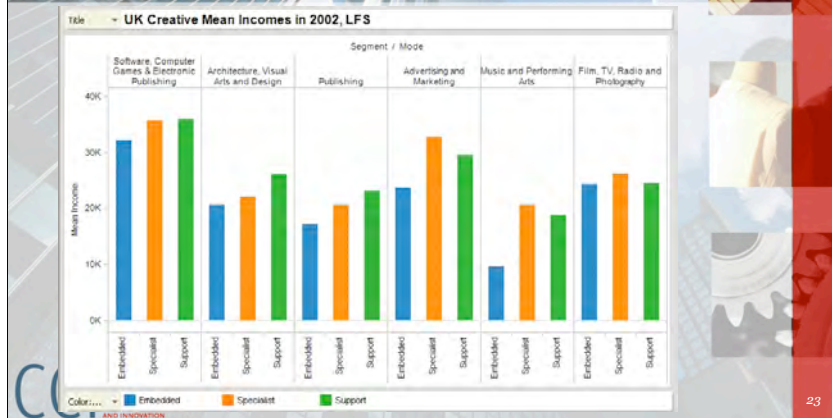
The total earnings contributed by specialist and embedded creatives and support staff by segment - 2006



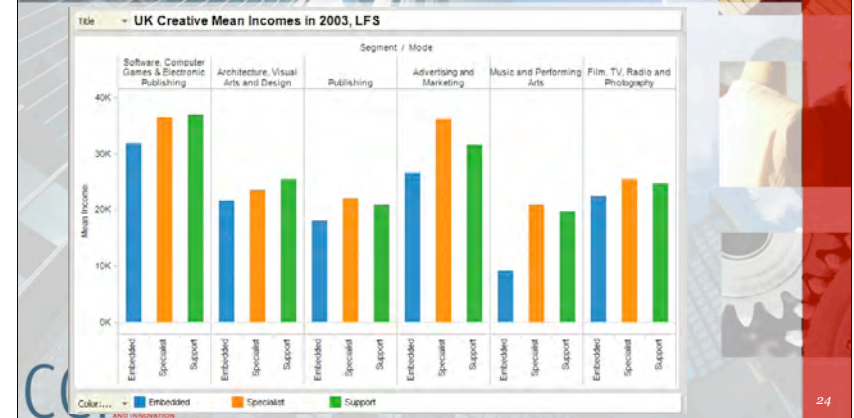
The Mean Incomes of specialist and embedded creatives and support staff by segment - 2001



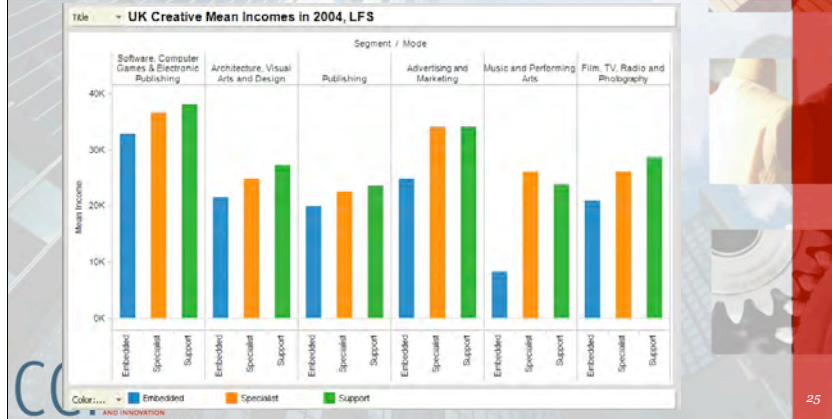
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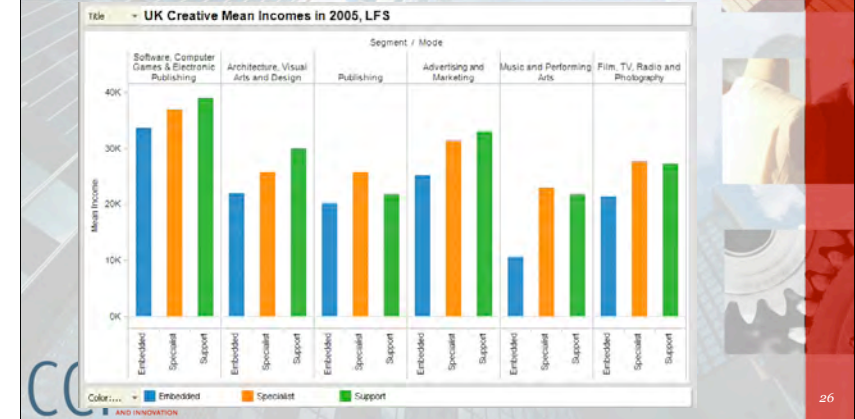
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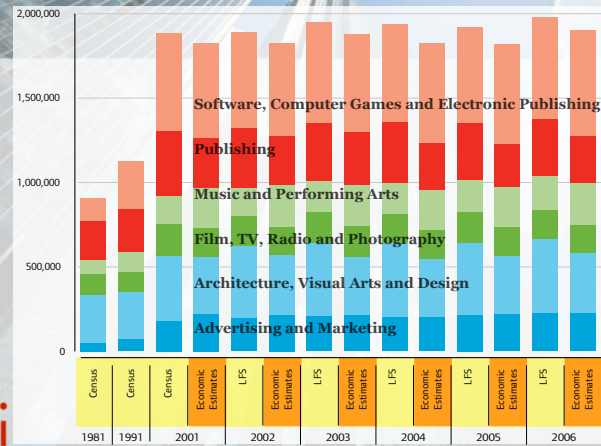
The Mean Incomes of specialist and embedded creatives and support staff by segment - 2006



Key Findings

- The creative economy accounts for over 7 per cent of UK employment, consistent with the official estimates
- Creative employment has grown strongly over the long run
- The largest growth has been in the software, computer games and electronic publishing segment
- Creative incomes are higher than average
- The creative workforce earned 9.6 per cent of all UK earnings
- More creative people work outside the creative industries than inside them

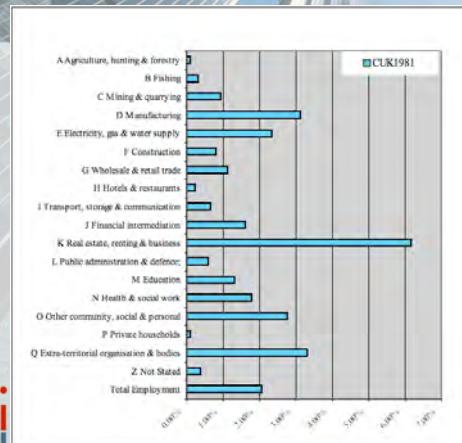
Employment Summary: Beyond CI and DCMS Economic Estimates



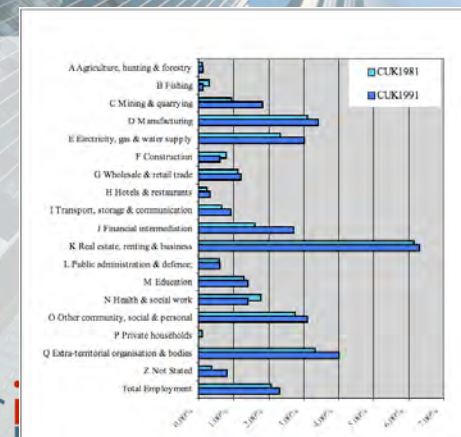
The Growth in Embedded Creatives

- Account for 2% to 2.5% of workforce and growing
- Accounts for over a third of Creative workforce
- Some sectors/divisions of the economy have high percentages
 - 'manufacturing', 'real estate', 'business activities', 'wholesale and retail trade', and 'financial inter-mediation'
- Relative mean incomes of embeddeds vary by their segments and division.
- Knowing the shifts in embedded, specialist and support employment can make important contribution to understanding the trends in creative employment

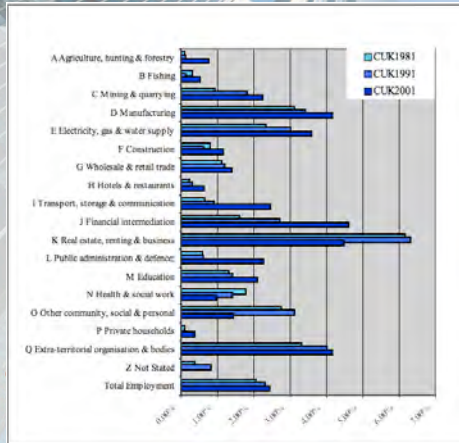
Embedded Employment by Division UK Census 1981



Embedded Employment by Division UK Census 1991

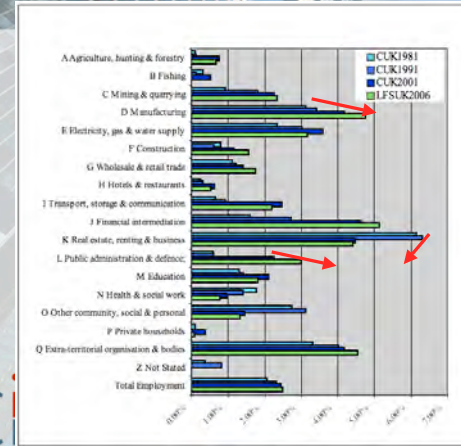


Embedded Employment by Division UK Census 2001



33

Embedded Employment by Division LFS 2006



34

Metrics Related Findings:

- No single measure (such as employment) could provide a complete answer- maximise usefulness and improve.
- Important to ground measurements against the whole of economy - relative impact, consistency & calibration of other measures
- Adjust classifications within segments to suit purpose and data set: employment vs Input/Output vs exports.
- Variations seen over time and place are probably more significant than the absolute size of a particular measure
- The 'friction' involved in finding, acquiring and preparing data for research can be considerable - Research data friction reduces investigation.

35

Policy Implications

A shift in focus:

- from creative industries to creative economy
- industry to occupation
- outputs to inputs into wider economy

36

Implications of this seen in light of:

- Staying Ahead
- Creative Britain
- Innovation Nation

Discussion

- Policy implications - embeddeds?
- Relevance to industry specific measurements?
- Availability of data - regional and local areas?
- “Research Data Friction”?
- Creative employment and agglomeration forces
- Segment, sub-segment definitions
- Data sharing/ peer review/bottom up benchmarking