



Welcome to

# WALES CHINA CREATIVE INDUSTRIES FORUM

**ATRIUM**

cardiff school of creative & cultural industries

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# WALES CHINA CREATIVE INDUSTRIES FORUM

## Overview of the Creative Industries in Wales

Professor Peter Robertson, University of Glamorgan

## Creative Industries – UK Context

Total Employment in Creative Industries  
just under 2 million people

- 640,900 jobs in software & computer games
- 262,800 jobs in music, visual & performing arts
- 275,800 jobs in publishing
- 247,200 jobs in advertising

157,400 businesses in creative industries sector.

Department for Culture, Media & Sport, Creative Industries Economic Bulletin(2007).

## Creative Industries – UK Context

“the UK has probably the largest creative sector in the EU, and relative to GDP probably the largest in the world”

7.3% of national GVA, and 2.7% of employment

Work Foundation - Staying ahead: the economic performance of the UK's creative industries(2007).

## Creative Industries – UK Context

“Creative people don’t just cluster in places where jobs are. They cluster in places that are centres of creativity and also where they like to live.”

“The right education, training and support are also essential to nurture talent and retain businesses and individuals...”

Richard Florida(2002).

## Creative Industries – UK Context

“Creative Industries are 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.”

Creative Industries Task Force(1998).

# Creative Industries – UK Context

## Key Industry Sub-sectors

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

Audio-visual (AV)	Books & Press (BP)
TV & radio Film & video Photography Advertising Music Interactive digital media (games, web, mobile etc) Computer software	Publishing (books, magazines, newspapers) Literature Printing
Performance (P)	Visual Arts & Design (VA)
Theatre Dance Circus Carnival Puppetry	Design (inc. fashion design) Architecture Fine arts Crafts Art & Antiques

# Creative Industries – UK Context

Employment has grown by 26% between 1997 & 2007.

Design and Designer Fashion – 62% growth.

Software and Computer Games – 69% growth.

In the current recession – Publishing, Architecture and Advertising in decline; Video, Film & Photography static.

Work Foundation(2007).

# Creative Industries – UK Context

## Exports of Services for the Creative Industries 2007

Advertising	Architecture	Art & Antiques	Design	Video & Film	Music	Publishing	Software	Radio & TV
1,400	740	3,100	830	1,100	270	2,100	4,900	1,400 (£million)

TOTAL EXPORTS OF SERVICES - £16,000 million in 2007.

## Employment in the Creative Industries 2007

Advertising	Architecture	Art & Antiques	Design	Video & Film	Music	Publishing	Software	Radio & TV
247,200	120,700	21,800	130,700	65,400	262,800	275,800	640,900	103,400

TOTAL EMPLOYMENT IN UK in 2007 – 1,978,200.

Dept. Culture Media & Sport, Creative industries Economic Bulletin (2007).

# Creative Industries – Welsh Context

## Employment Trends in the Creative Industries in Wales.

1,700 working in Design and Designer Fashion.

11,083 employed in visual arts, crafts and design with a £213 million turnover.

3550 working in film, television and media.

4985 working in performing arts and music - £100 million.

100 published authors in Wales.

# Creative Industries – Welsh Context

## Employment in the Creative Industries 2007

Advertising	Architecture	Art & Design	Video & Film	Music	Publishing	Computer Games	Radio & TV
884	2,321	11,038	1752	4985	2732	100	3043

TOTAL EMPLOYMENT IN WALES in 2007 – 35,360.

Burns Owens Partnership (2009).

# Results of Mapping Exercise

## Employment in Creative Industries in Wales

SIC code	LQ	Jobs in Cardiff	Jobs in Wales
9220 : Radio and television activities	3.98	1,995	3,043
2223 : Bookbinding	3.14	45	87
9231 : Artistic and literary creation and interpretation	2.73	702	1,562
9211 : Motion picture and video production	2.56	192	454
9240 : News agency activities	2.55	29	69
9232 : Operation of arts facilities	2.42	449	1,124
2214 : Publishing of sound recordings	2.33	15	39
7221 : Publishing of software	2.27	36	96
2224 : Pre-press activities	2.14	66	187
2211 : Publishing of books	1.90	136	433
9213 : Motion picture projection	1.90	267	854
7420 : Architectural and engineering activities and related technical consultancy	1.71	653	2,321
7440 : Advertising	1.63	237	884
7222 : Other software consultancy and supply	1.49	1,299	5,288
7481 : Photographic activities	1.31	96	444
2212 : Publishing of newspapers	1.31	421	1,956

Source: ABI/BOP Consulting, 2009

# Results of Mapping Exercise

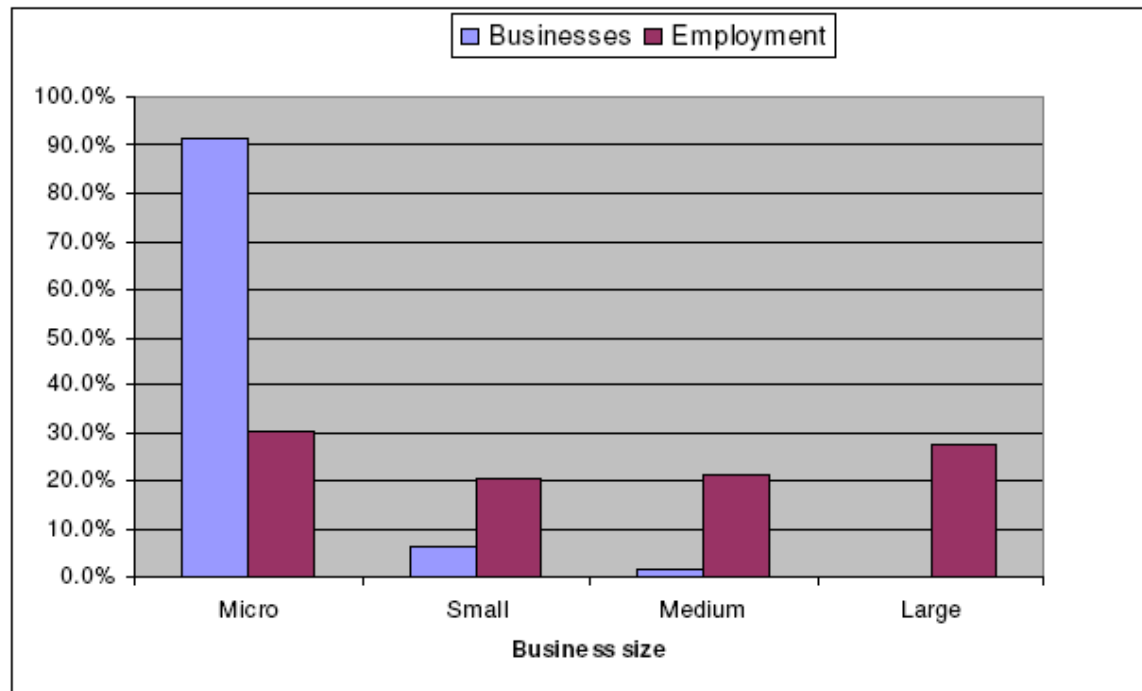
## Share of Employment in Creative Industries in Wales

Rank	Local Authority District	% CI share (DET)	Total number
1	Cardiff	4.6%	8,890
2	Ceredigion	4.1%	1,030
3	The Vale of Glamorgan	3.5%	1,230
4	Conwy	3.4%	1,200
3	Flintshire	3.3%	2,200
6=	Monmouthshire	3.2%	1,050
6=	Bridgend	3.2%	1,770
8	Pembrokeshire	3.0%	1,230
9=	Powys	2.9%	1,340
9=	Gwynedd	2.9%	1,330
11	Denbighshire	2.8%	1,080
12	Swansea	2.7%	2,830
13	Torfaen	2.6%	910
14	Carmarthenshire	2.3%	1,390
15	Merthyr Tydfil	2.1%	480
16=	Blaenau Gwent	2.0%	390
16=	Newport	2.0%	1,460
18=	Wrexham	1.8%	980
18=	Neath Port Talbot	1.8%	780
20=	Rhondda, Cynon, Taff	1.7%	1,290
20=	Anglesey	1.7%	330
22	Caerphilly	1.6%	810
	<b>Wales</b>	<b>2.9%</b>	<b>34,010</b>

Source: ABI/BOP Consulting, 2009

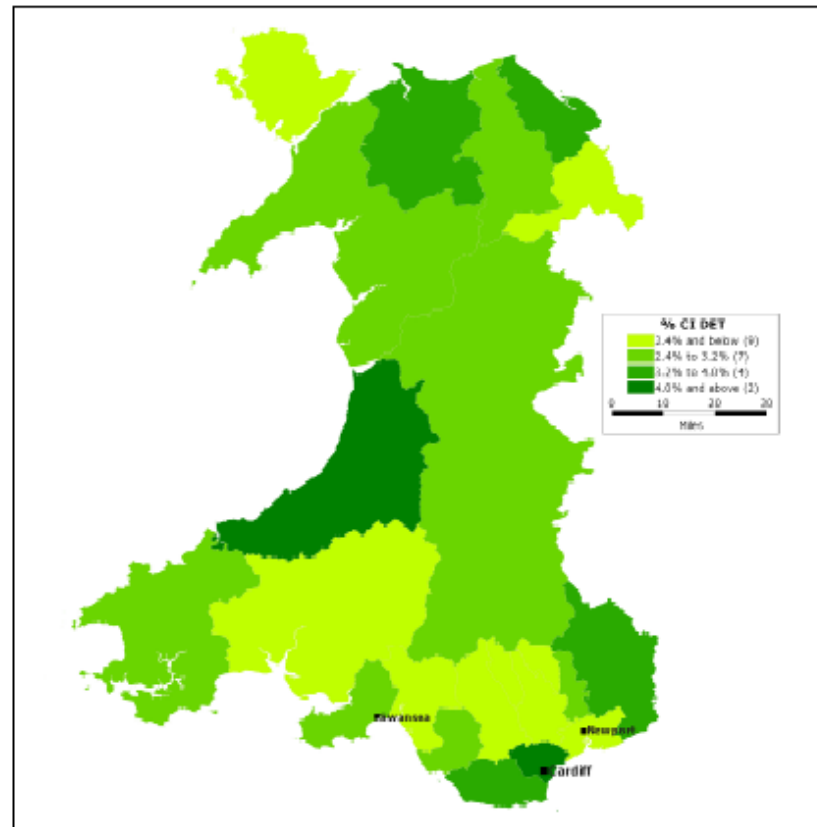
# Results of Mapping Exercise

## Share of Creative Businesses and Employment by size -2007



Source: ABI/BOP Consulting, 2009

# Results of Mapping Exercise



Source: ABI/BOP Consulting, 2009

# Results of Mapping Exercise

## Key Trends

- Job numbers grew by 7% over the five years under review, to 34,010. This amounted to just under 5% of the Welsh workforce. Creative industry firms tend to be smaller than the average.
- Around half these jobs were found to be in audio-visual industries such as television, film, and computer software.
- Cardiff has easily the largest number of creative sector jobs of any local authority area in Wales. In all, the city accounts for more than a quarter of Welsh creative employment.
- Wales particular strengths include radio and TV, artistic and literary creation, film production, the operation of arts organisations, and publishing of music, books, and computer software.

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# Conclusions

## Current and Future Trends

- In the mapping exercise for Cardiff 52% expected their business to grow gradually over the next three years, 17% thought it would grow strongly, while 23% thought it would stay the same. Only 7% thought their business would contract at all.
- The presence of S4C and the BBC Wales was mentioned repeatedly.
- The creative industries are in an increasingly dynamic environment, such to rapid change, driven by the global economy, fluctuating markets and new technologies.
- The talent pool of labour for the creative industries in Wales was felt to be relatively small. Portfolio careers are becoming increasingly common and increasingly necessary for sole traders and freelancers.



# ATRIUM

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