



Department
for Culture
Media & Sport

Creative Industries: Focus on Exports

June 2015

30/06/2015

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

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Chapter 1: Introduction

This report provides estimates of the value of services exported by the UK Creative Industries for 2009 to 2013. It complements the Creative Industries Economic Estimates¹, providing more detailed and timely information on Exports of Services by Creative Industries Group (section 3.2) and continent (section 3.3).

The Creative Industries were defined in the Government's 2001 Creative Industries Mapping Document² 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 Annex A and Annex B of the January 2014 statistical release³. It is based on the principle of "creative intensity" and essentially comprises three steps.

1. Identification of creative occupations⁴.
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 creative intensity of each industry are set out in Annex A of this report.

Exports of Services are measured using 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 continent that they are exported to. This section looks at Exports of Services from the Creative Industries themselves, and does not consider Exports of Services from the wider Creative Economy. Results are in current prices (i.e. are not adjusted for inflation).

¹ <https://www.gov.uk/government/publications/creative-industries-economic-estimates-january-2014>

² <https://www.gov.uk/government/publications/creative-industries-mapping-documents-2001>

³ <https://www.gov.uk/government/statistics/creative-industries-economic-estimates-january-2014>

⁴ 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

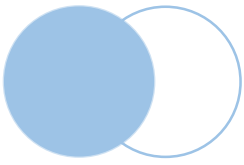
- The value of services exported by the UK Creative Industries in 2013 was £17.9bn.
- Exports of Services by the UK Creative Industries increased by 3.5 per cent between 2012 and 2013, and by 34.2 per cent between 2009 and 2013.
- In total, exports of services from the Creative Industries accounted for 8.7 per cent of total exports of services for the UK in 2013.

By Creative Industries Group

- In 2013, exports of services from the 'IT, software and computer services' accounted for 48.1 per cent of service exports from the Creative Industries, up from 46.4 per cent in 2012.
- Exports of services from the 'Film, TV, video, radio and photography' industry accounted for just under a quarter of the Creative Industries total in 2013 (22.6%).
- 'Music, performing and visual arts' had the greatest percentage increase between 2012 and 2013, increasing by 22.7 per cent, taking the value of exports of services from for this group from £0.6bn in 2012 to £0.7bn in 2013.

By continent Europe was the continent in receipt of the majority of exports of service from the UK Creative Industries in 2013, with £10.1bn or 56.4 per cent of the total exports of services by UK Creative Industries.

- America was next with 28.9 per cent of total exports of services for UK Creative industries (£5.2bn). These were followed by Asia (10.3%), Australia (2.0%) and Africa (1.9%).



Chapter 3: Exports of Services (2009-2013)

3.1 Exports of services for the UK Creative Industries

In 2013 the value of services exported by the UK Creative Industries was £17.9bn, an increase of 3.5 per cent (£0.6bn) since 2012 and 34.2 per cent since 2009 (£4.6bn). In the same period the value of services exported by all UK industries was £204.5bn, which was an increase of 4.5 per cent since 2012 and 20.6 per cent since 2009.

Exports of services from the Creative Industries accounted for 8.7 per cent of total exports of services for the UK in 2013 (8.8% 2012, 7.8% 2009).

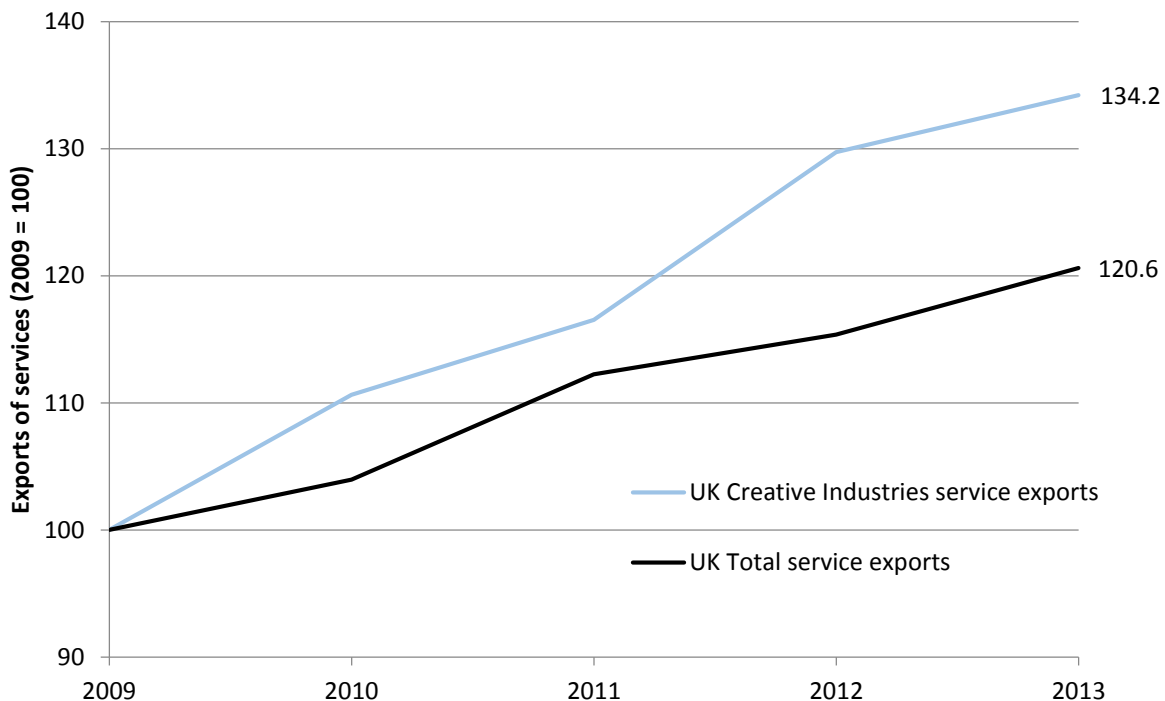
Table 1: Exports of Services for UK Creative Industries

Creative Industries Group	Exports (£m)				
	2009	2010	2011	2012	2013
Advertising and marketing	£2,136	£1,861	£2,013	£2,343	£2,641
Architecture	£319	£384	£362	£373	£359
Crafts	-	-	-	-	-
Design: product, graphic and fashion design	£116	£122	£131	£190	£204
Film, TV, video, radio and photography	£3,826	£4,658	£4,257	£4,345	£4,034
IT, software and computer services	£5,811	£6,286	£7,210	£8,011	£8,589
Publishing	£806	£1,032	£1,245	£1,415	£1,315
Museums, galleries and libraries	-	-	-	-	-
Music, performing and visual arts	£286	£357	£275	£574	£704
Creative Industries Total	£13,303	£14,719	£15,503	£17,258	£17,856
UK Total (ONS Balance of Payments, Pink Book)	£169,514	£176,241	£190,268	£195,593	£204,465
Creative Industries as a percentage of UK Total	7.8%	8.4%	8.1%	8.8%	8.7%

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 from £15.5bn to £17.3bn. In the same period the value for all UK service exports suffered its weakest growth rate, from £190.3bn to £195.6bn, an increase of just 2.8 per cent. Between 2012 and 2013 the percentage increase in total UK service exports was greater than that of exports of service from the UK Creative Industries (an

increase of 4.5% for the whole UK and an increase of 3.5% for the UK Creative Industries).

Figure 1: Changes in Exports of Services indexed to 2009 = 100



3.2 Estimates by Creative Industries Group

In 2013, exports of services from the ‘IT, software and computer services’ accounted for 48.1 per cent of service exports from the Creative Industries, up from 46.4 per cent in 2012. Exports of services in this sector increased from £5.8bn in 2009 to £8.0bn in 2012, and most recently to £8.6bn in 2013. This was an increase of 8.2 per cent between 2009 and 2010, 14.7 per cent between 2010 and 2011, 11.1 per cent between 2011 and 2012 and 7.2 per cent between 2012 and 2013.

Exports of services from the ‘Film, TV, video, radio and photography’ industry accounted for just under a quarter of the Creative Industries total (22.6%) and exports of services from ‘Advertising and Marketing’ continued to increase in 2013, after a dip in 2010, accounting for 14.8 per cent of the Creative Industries total, up from 13.6 per cent in 2012.

The group which grew by the largest percentage between 2012 and 2013 was ‘Music, performing and visual arts’, increasing by 22.7 per cent during this time period, taking the value of exports of services from ‘Music, performing and visual arts’ from £0.6bn in 2012 to £0.7bn in 2013.

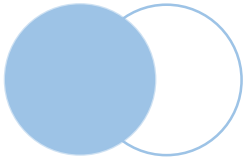
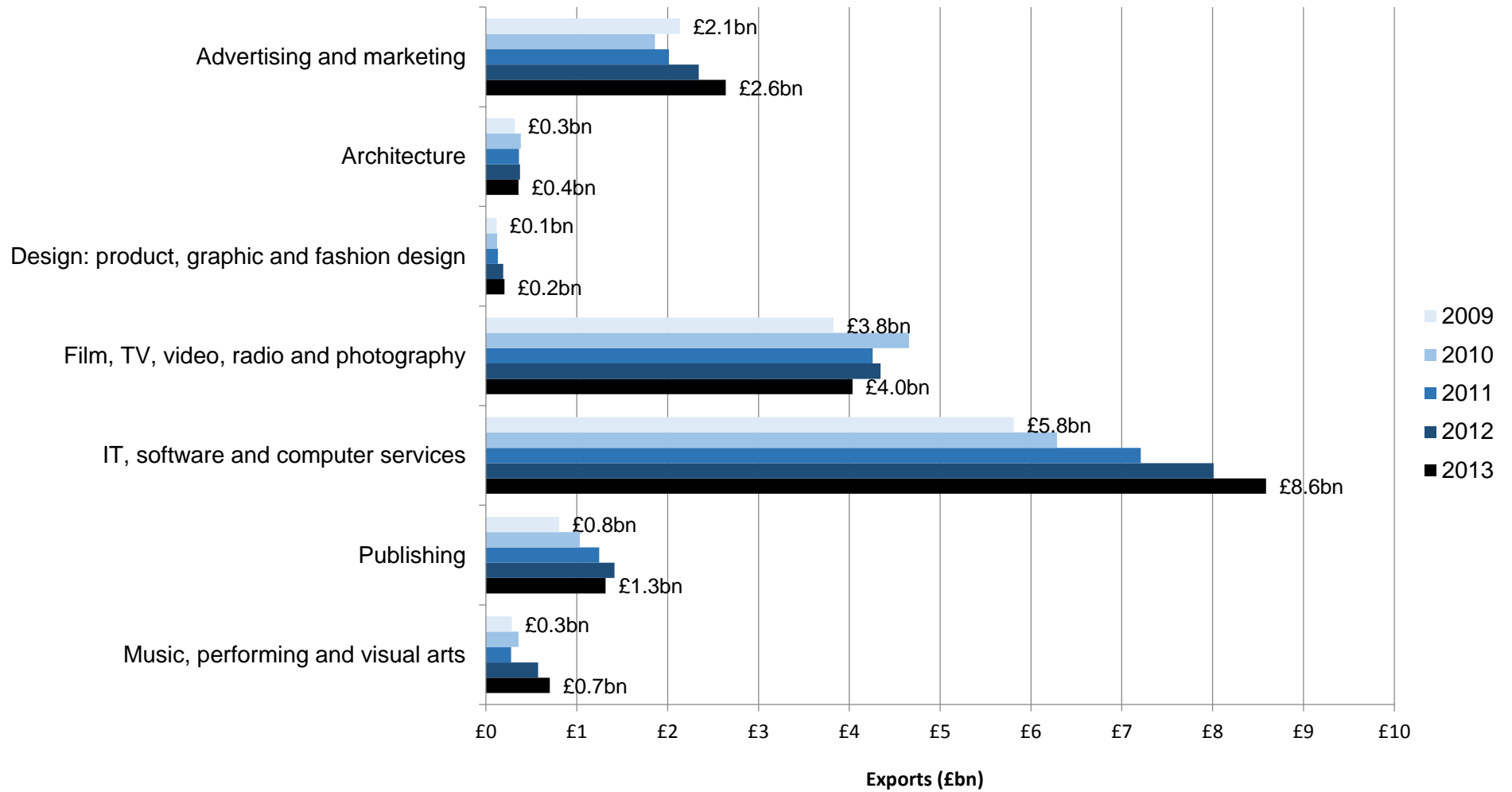


Figure 2: Value of Exports of Services (2009 – 2013)



3.3 Exports of services for the UK Creative Industries by continent

In 2013 Europe was the continent in receipt of the majority of exports of service from the UK Creative Industries with £10.1bn or 56.4 per cent of the total value of exports of services by the UK Creative Industries. 28.9 per cent of the total exports of services from the UK Creative Industries went to America (£5.2bn) and 10.3 per cent went to Asia (£1.8bn). Australia and Africa were in receipt of 2.0 per cent and 1.9 per cent respectively of the total value of exports of services from the UK Creative Industries.

Table 2: Exports of Services for UK Creative Industries by continent and Creative Industries Group

Creative Industries Group	Exports (£m)					
	Europe	America	Asia	Australia	Africa	Industry total
Advertising and marketing	£1,592	£701	£290	£22	£26	£2,641
Architecture	£79	£72	£177	£2	£26	£359
Crafts	-	-	-	-	-	-
Design: product, graphic and fashion design	£133	£30	£29	£5	£2	£204
Film, TV, video, radio and photography	£2,279	£1,272	£251	£98	£96	£4,034
IT, software and computer services	£4,943	£2,482	£819	£179	£147	£8,589
Publishing	£590	£405	£238	£39	£33	£1,315
Museums, galleries and libraries	-	-	-	-	-	-
Music, performing and visual arts	£447	£190	£40	£18	£3	£704
Total	£10,065	£5,155	£1,848	£365	£333	£17,856

Exports of services from the 'IT, software and computer services' group made up the majority of receipts for each continent. In Australia exports of services from this group made up 49.2 per cent of all exports of services from the UK Creative Industries. In Europe the figure was 49.1 per cent and the respective figure in America was 48.1 per cent.

The 'Film, TV, video, radio and photography' sector also made up a large proportion of exports of service from the UK Creative Industries in each continent. In Africa £1.0bn (28.8%) of exports of services from the UK Creative Industries were from this sector, in Australia 27.0 per cent of receipts from the UK Creative Industries were from this sector and the figures for America, Europe and Africa were 24.7 per cent, 22.6 per cent and 13.6 per cent respectively.

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.

Creative Industries Group	SIC	Description
Advertising and marketing	70.21	Public relations and communication activities
	73.11	Advertising agencies
	73.12	Media representation
Architecture	71.11	Architectural activities
Crafts	32.12	Manufacture of jewellery and related articles
Design: product, graphic and fashion design	74.10	Specialised design activities
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
IT, software and computer services	58.21	Publishing of computer games
	58.29	Other software publishing
	62.01	Computer programming activities
	62.02	Computer consultancy activities
Publishing	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
Museums, galleries and libraries	91.01	Library and archive activities
	91.02	Museum activities
Music, performing and visual arts	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, of each SIC code included in these estimates is shown in Table 11 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:

- 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 no statistically robust (due to low levels of employment of the 4-digit codes).*
- 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.*
- SIC code 32.12 Manufacture of jewellery and related articles has been included after consultation to represent the Crafts industry, although due to limitations in the underlying SIC codes (which are agreed internationally) this clearly does not fully capture the crafts sector.*
- Industry codes proposed and the rationale for inclusion can be found in the consultation <https://www.gov.uk/government/consultations/classifying-and-measuring-the-creative-industries-consultation-on-proposed-changes>*